Planning For Your Family Meeting

This material has been adapted from the Ties To The Land program.

Top Three Reasons Why Family Meetings Are Important

1. A time when you can share information face to face in an efficient manner. You have been working hard to develop your estate overview, set the goals that you have for the future of your land and
2. Shows your family that you want them to be involved in the planning for your land legacy and its management.
3. Set the stage for honest and productive communication between your family members.

Setting Your Family Meeting Up For Success

1. **Create an agenda that can be shared with everyone before the meeting**. Ask your family if they have any comments or additions. Make sure that everything is clear and there won't be any surprises at the meeting and everyone understands what will be discussed. If you are planning to make decisions from this meeting, make sure that everyone knows the questions around these decisions and how these decisions will be made.
2. **Select a neutral location**. Plan to have the meeting somewhere where there aren't any family connections or emotions tied to that location. Good options include a restaurant or conference room.
3. **Consider hiring a trained facilitator**. If you plan to discuss difficult issues, a trained facilitator can help ensure that everyone has a voice and the discussion sticks to the agenda. Another benefit, with a facilitator everyone will tend to be more respectful. Even though this is an additional expense, it can be a worthwhile investment especially for your first meeting.
4. **Decide who you will invite to participate in the meeting**. Are you going to include just your family members (children, nieces, nephews, siblings, etc.) or their spouses as well? Do you have multiple generations (perhaps your children and grandchildren are all adults)? Will you include all of them or just one generation? Whatever you decide, invite all spouses/grandchildren or none, don't just invite some and not others. Or leave it up to your children/family members to decide. Whatever you decide, during the meeting, include everyone in the same way, treating them all equally.
5. **Have a social event after the meeting**. Have a dinner or bbq or something fun and social after the meeting where everyone can be invited, including spouses, small children, etc. To reinforce that everyone is part of the family and you appreciate the time everyone investing in the meeting.
6. **Recognize that your family members have a long history together**. These past relationships can cloud how people listen/understand what someone is saying. Ask everyone to work together as the adults they are and
7. **Have an icebreaker activity to start the meeting**. Yes your family grew up together but how well do they really know each other as adults? Again this can help reinforce number 6, setting the stage that everyone is an adult now. This activity can help everyone get to know each other in a different light, as grownups.

8. **If possible, offer to pay for the travel and child care for your family members**. This will help your family understand how important this is to you and help mitigate any financial burden they might feel from attending.
9. **Consider having your estate planning professionals at the meeting**. If you have already developed your estate plan, your lawyer or accountant could help answer any questions that your children might have about the plan.
10. **Share your vision for the future of your land**. Make this a part of your agenda and speak about why your land is so important to you, what you hope for the future. This will help your family members understand your goals and how they can be a part helping you achieve them. Ask them about their goals for the land, see where there is overlap and where you can work together around shared goals.

Family Meeting Planning Checklist

- Location of the meeting:
- Hosts (this is you and your spouse/co-owners):
- Date:
- Time:
- Chair (the person who will keep the meeting running and moving through the agenda):
- Note taker (will participate in the meeting but commits to documenting the discussion):

Reaching out to your family members

Participants	Date of Preliminary Phone Call	Invitation Sent (Include date)	Follow-up Phone Call	RSVP

Invitation

Include a short description of what you plan to accomplish/share; meeting details (when, where, what, who); attach agenda, guidelines for effective communications and the heirloom scale. This invitation doesn't have to be formal, it can be an email you send to all your participants. Plan to send after you have talked to all the participants so they understand the purpose of the meeting and what you hope to accomplish.

Agenda

Outline the topics that you would like to present and discuss, include who will do the presentation and when there is time for open discussion when everyone can participate. Topics that can be included:

- Welcome, thanks and review of the purpose of the meeting
- Sharing your Estate Overview (Worksheet 1) followed by discussion
- Share current owners goals for their land including long term legacy goals
- Sharing the Heirloom Scale (Worksheet 2) completed by the current owners

- Activity: everyone fills out their own heirloom scale then discuss results
- Share your Who Does What On Your Land (Worksheet 4)
- Share your Documents You Need For Your Estate Plan (Worksheet 6)
- Discussion about next steps