

A FAMILY CONVERSATION GUIDE

Planning does not mean you are ready to move. It means your family will understand what matters to you and be better prepared to honor your wishes if circumstances change.

Why begin the conversation now?

Many families wait until a fall, illness, hospitalization or loss forces decisions to be made quickly.

A conversation now can help you:

- Stay in control of your choices
- Reduce worry and uncertainty for your children
- Make decisions thoughtfully instead of during a crisis
- Explore ways to remain independent
- Give everyone time to understand your priorities

How to begin

Choose a quiet, relaxed moment. You do not need a complete plan, and you do not need to cover everything at once. You are simply opening the door.

You might say:

"I am not planning to make a change right now, but I would like you to understand what is important to me."

"I want to remain in control of my decisions. Can we talk about what I would want if my needs changed someday?"

"If something unexpected happened, I would not want you to have to guess. Could we begin a conversation while we have the luxury of time?"

"I know you may have concerns. I would like to hear them, and I also want to share what independence means to me."

Remember: The goal of the first conversation is understanding - not agreement on every detail.

QUESTIONS TO EXPLORE TOGETHER

Use the questions that feel most relevant. Let them lead to a series of conversations rather than one long meeting.

1) My life at home

- What do I value most about living in my current home?
- What parts of the house or property are becoming tiring or difficult?
- Are there activities I avoid because they have become harder or less safe?
- What help, repairs or modifications would make life easier now?
- How well would this home support me if my mobility or health changed?

2) What matters most to me

- Which relationships, routines, activities and places are most important to me?
- Do I have enough social connection and reliable transportation?
- What gives my days meaning and purpose?
- What would I want to preserve if I ever changed where I live?

EVERY MOVE. EXPERTLY GUIDED.

3) If my needs changed

- Would I prefer help at home, a smaller home, a 55+ community or senior living?
- What level of help at home would feel comfortable - and what might feel intrusive?
- Would I be willing to visit a few communities simply to learn what is available?
- How close would I want to be to family, friends, doctors, church and familiar places?
- What circumstances would tell us that remaining at home is no longer safe or practical?

A Helpful Promise to One Another

We will speak openly, listen respectfully and revisit the plan as circumstances change. Asking for help will not mean losing independence; it will be one way of protecting it.

Information My Family Should Know

You do not need to share every private detail today. It is helpful, however, for at least one trusted person to know where important information can be found.

Health & emergencies

- Who should be contacted first in an emergency?
- Where are my medication list, doctors' names and insurance information?
- Who would I trust to speak for me if I were temporarily unable to do so?
- Do I have a plan for a fall, hospitalization or temporary need for care?

Legal & financial planning

- Are my will, powers of attorney and advance healthcare directive current?
- Does someone I trust know where those documents are kept?

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- Who is authorized to help with healthcare, finances and bills if necessary?
- What care or housing options could I comfortably afford?
- Do I have long-term-care insurance, veterans' benefits or other resources?

My home & belongings

- What repairs or improvements should be addressed before they become urgent?
- If I stay in my home, what is the plan for maintenance and increasing support?
- Which belongings matter most, and what would I like to give to family?
- Would simplifying now make my home safer or easier to enjoy?
- If a move became necessary, who could help coordinate the details?

Choose One Next Step

START	ORGANIZE	EXPLORE
Set a time for the next family conversation.	Gather key contacts and documents in one place.	Learn about support and housing options before they are needed.

A Trusted Guide Can Help

A family's housing decision is rarely only about real estate. It may involve health, finances, family dynamics, belongings, timing and a lifetime of memories.

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As an experienced Certified Senior Advisor (CSA®) and Compass Plus real estate professional, I can help your family:

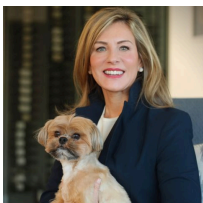
- Begin with a calm, confidential conversation - without assuming a move is the answer
- Consider how well the current home supports present and future needs
- Explore aging in place, downsizing, 55+ communities and senior living
- Connect with trusted professionals for home modifications, organizing, moving, estate sales and repairs
- Create a thoughtful plan for preparing and selling the home if and when the time is right

A CSA® and real estate professional does not replace medical, legal, financial or care professionals. The value is in asking better questions, recognizing how the issues connect and helping assemble the right team.



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