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FREE PRINTABLE GUIDE

First Family Care Meeting Guide

A guide for the family conversation that should happen before a crisis

Introduction. The first family care conversation does not need to solve every problem. Its job is to create a shared picture of what is changing, what matters to the older adult, and what should happen next.

How to use this guide. Choose a calm moment and use the sections as a guide rather than a script. Listen first, write down one or two next steps, and return to unfinished topics later.

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Prepare the setting

A few practical points to keep in mind.

- ☐ Choose a calm time rather than beginning immediately after a crisis.
- ☐ Invite the older adult and only the people who need to make the next decision.
- ☐ Agree that the purpose is to understand the situation, not to settle every disagreement.

Open the conversation

A few practical points to keep in mind.

- ☐ Start with what is going well and what the older adult wants to keep doing.
- ☐ Describe one specific change without exaggeration or blame.
- ☐ Ask what kind of help would feel acceptable before suggesting a solution.

Sort what you hear

A few practical points to keep in mind.

- ☐ Separate immediate safety concerns from tasks that can wait.
- ☐ Separate facts from assumptions about what someone can or cannot do.

- ☐ Mark questions for a clinician, social worker, or attorney instead of trying to answer them at the table.

Agree on one next step

A few practical points to keep in mind.

- ☐ Choose one action that can be completed within the next week.
- ☐ Give the action to one named person rather than the whole family.
- ☐ Set a date to revisit the conversation and change the plan if needed.

What tends to help afterward

The first meeting rarely settles everything. Its value is that the family now has a shared starting point and one action that can be tested.

A plan that respects the older adult's choices can change as circumstances change. Revisit it before a small difficulty becomes an emergency.

Important note: *This guide is general information, not medical, legal, financial, or caregiving advice and not a substitute for a clinician, social worker, or attorney. Discuss health concerns with an appropriate professional, obtain legal advice from a qualified attorney, and respect the older adult's choices and privacy.*

This is general information for preparing a conversation or next step, not individualized professional advice.

Notes and what to buy
