FREE FAMILY GUIDE

The Holiday Family Conversation Guide

5 Parts, 22 Steps · Printable PDF · MVP Law Group, APC

The whole family is together. That makes this one of the best times of the year to talk about the plan, and one of the easiest times to put it off again.

This guide helps you start gently. Work through it before the gathering, use the openers as written if you like, and fill in the last part afterward. Tick each step as you go. Your progress is saved on this device.

WHY TALK ABOUT IT NOW

What families tell us after a hospital stay or a loss

The hardest part is often **not knowing what Mom or Dad wanted**, and having to guess.

Families lose weeks **looking for papers** and finding out which accounts exist.

Siblings argue less when **everyone heard the same thing at the same time**.

Parents are often **relieved someone finally asked**.

1 Before the gathering

- [ ] **Pick one or two goals.**
  You do not need every answer this year. For example: is there a will or a trust, and who would make medical decisions?

- [ ] **Talk to your siblings first.**
  Agree that the goal is to listen and help, not to divide anything.

- [ ] **Choose the moment.**
  A walk, a drive, or coffee the next morning often works better than the main meal.

- [ ] **If you are the parent, decide what you want to share.**
  Telling your children who you named and where your papers are is one of the kindest things you can do.

2 Open the conversation

Pick the opener that sounds most like you.

- [ ] **"A friend just went through a hard time with her dad's estate. Do you have things set up the way you want?"**
  A story about someone else takes the pressure off.

- [ ] **"I just did my own will. Have you ever done yours?"**
  Going first makes it normal.

- [ ] **"If something ever happened, I would want to do what you want. Can you tell me what that is?"**
  This makes it about their wishes, not about money.

- [ ] **"I do not need the numbers. I just want to know where things are if you ever need help."**
  Most parents relax when they hear this.

3 The questions

Ask one or two this year. Come back to the rest.

- [ ] **Do you have a will or a trust, and where is the original?**
  Ask who the attorney was and when it was signed.

- [ ] **Who did you name to step in for you?**
  For money (power of attorney), for medical decisions (health care directive), and after a death (trustee or executor).

- [ ] **What would you want if you got very sick?**
  Treatment, where they would want to be cared for, and any religious or personal wishes.

- [ ] **Where are the important papers?**
  The will or trust, the deed, insurance policies, bank and retirement accounts, the car title.

- [ ] **Who is the beneficiary on your accounts?**
  Retirement accounts and life insurance go to whoever is on the form, no matter what the will says.

- [ ] **What do you want to happen to the house?**
  How it is titled changes what happens next.

- [ ] **Is there anything you are worried about?**
  Leave room for the answer you did not expect.

4 If it gets tense

- [ ] **Pause it.**
  "Let's come back to this tomorrow" is a complete sentence.

- [ ] **Make it about them.**
  "I am not asking what I get. I am asking how I can help you."

- [ ] **Do not decide anything at the table.**
  The goal is to understand, not to settle who gets what.

- [ ] **Offer a neutral voice.**
  Some parents find it easier to talk with an attorney in the room. A family meeting can help.

5 After the holiday

- [ ] **Write down what you learned while it is fresh.**
  Use the notes table below.

- [ ] **Send the family a short, kind summary.**
  "Thank you for talking about this. Here is what I understood."

- [ ] **Set a date in January to fill any gaps.**
  No will, an old trust, or no health care directive are all fixable while your parents can still decide for themselves.

FILL IN AFTER THE CONVERSATION

What we learned

Topic	What we learned	Next step
Will or trust		
Power of attorney		
Health care directive		
Who is named		
Where the papers are		
Wishes and worries		
MVP Law Group	Estate planning, family meetings	(818) 788-7881

FAMILY MEETINGS

Some conversations go better with a neutral voice

If your family found gaps, or if a parent would rather talk it through with an attorney, we can help, in Woodland Hills or by video, in English, Spanish, or Russian.

This guide is general information about California law as of November 2026, not legal advice, and it does not create an attorney-client relationship. Every family is different. For advice about yours, speak with an attorney. Attorney Advertising.