Family Meeting Agenda Template

Keep it under 90 minutes. Include your loved one when possible. Assign a note-taker.

MEETING DATE & TIME	LOCATION / VIDEO LINK
ATTENDEES	NOTE-TAKER
NEXT MEETING DATE	

Discussion topics

- [ ] What is happening now: health, safety, daily needs?
- [ ] What does our loved one want? (Ask them first.)
- [ ] What options are we considering?
- [ ] What will it cost, and who can help pay?
- [ ] How is the main caregiver holding up?

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» Send the agenda in advance so no one feels ambushed.

» Invite a neutral professional, like a care manager, if things are tense.

Decision-making process

- [ ] Who holds healthcare and financial power of attorney?
- [ ] How will we decide when we disagree?
- [ ] What decisions must be made now, and which can wait?

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» Agree to ground rules: no interrupting, focus on our loved one's wishes.

» Write down each decision and who agreed.

Follow-up action items

- [ ] Who will research options, and by when?
- [ ] Who handles money, rides, medical calls and check-ins?
- [ ] When is our next meeting?

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» Share notes in writing within 24 hours.

» Use the free Caregiver Dashboard to split tasks and track progress.

Notes