

## FAMILY MEETING CHECKLIST

Name: \_\_\_\_\_

- Do I have an updated will? (All adults should have one, not just senior family members.) \_\_\_\_\_
- Are there specific family heirlooms I would like to receive someday (or give to a specific family member)? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Do I have guardians (not just Godparents, who have no legal standing) for minor children? \_\_\_\_\_
- Do I have a contingent power of attorney to manage my financial affairs if I become ill? If you have a spouse, he or she can usually act on your behalf; however, it never hurts to spell out your instructions in black and white. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Do I have a living will and health care power of attorney? Most of all, you designate the individuals responsible for making such decisions. \_\_\_\_\_
- Are my life insurance, IRA and annuity beneficiary designations current? \_\_\_\_\_  
\_\_\_\_\_
- Are all my important documents in one place, such as a safe deposit box? Also, are designated family members' names on the signature card? \_\_\_\_\_  
\_\_\_\_\_
- Do I have a list of important information\*, such as bank and other account numbers, life insurance policies, retirement accounts, and other assets, along with the names and contact information of my attorney, Catholic Family representative, and other professionals (also best kept in your safe deposit box)? \_\_\_\_\_

**\*Catholic Family has a free "Important Information Brochure" available for this use. Call 1-800-227-2354 and ask for the fraternal department, or visit [www.cfli.org](http://www.cfli.org) to download your copy.**

- Do I need to contact my attorney and other professionals to update my will and other plans? Talking about these issues is important, but taking follow-up action is crucial. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Other Issues that need discussion \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Copy this form (or download it at [www.cfli.org](http://www.cfli.org)) and use it for family meetings. All adult family members should be encouraged to complete it before meeting. Then address each item as a platform for discussion.