



VAILLANCOURT & LEFEBVRE
WEALTH MANAGEMENT, LLC

David E. Vaillancourt, CPA, CFP®
Andrew R. Lefebvre, CFP®, RMA®, CLU, EA
www.myvlwealth.com
info@myvlwealth.com
Phone: 978-703-0020
Fax: 978-703-0022
1 Stiles Road , Suite 205
Salem NH, 03079

Family Meeting Checklist

To help you get started, we've put together a Family Meeting Checklist you can use as a guide. It includes topics to consider, questions to ask, and suggestions for making the conversation meaningful and productive.

PLANNING – PRIOR TO MEETING

- Pick time & place (comfortable and free of distractions)
- Decide who to include (spouses, adult children, key family members)
- Set a purpose
- Overview of financial plan
- High-level review:
 - Financial goals
 - Investment approach
 - Updates, etc.
- Key documents:
 - Wills & trusts
 - Power of attorney & health proxy
 - Tax documents
 - Account information

WHAT TO COVER – FITTING YOUR NEEDS

- Financial goals & strategy
- Estate planning or legacy wishes
- Review documents and their locations
- Update contacts lists
- Documents that need to be started/updated
 - What? Who? When?
- Estate information needed
 - What? Who? When?
- Consider setting a date for the next meeting

AFTER THE MEETING

- Encourage open communication
- Send a brief recap or notes to attendees
- Remind your family they can reach out to you – or us – for support

If you'd like help tailoring this to your family or want us to be available for follow-up questions afterward, we're always here for you.