

Family Meeting Planner

Use this fillable planner to organize your family meeting about inheritance, estate planning, and financial responsibilities. S

1. Meeting Overview

Meeting Date:
Location:
Organizer:
Facilitator (Attorney/Advisor):
Main Purpose:

2. Attendees

List the family members and key people attending this meeting.

Name 1: Relationship:

Name 2: Relationship:

Name 3: Relationship:

3. Agenda (Topics to Cover)

List the topics you want to cover during the meeting. Relationship:

Topic 1:

Topic 2:

Topic 3:

Topic 4:

4. Discussion Notes

Use this space to record key points, questions, and decisions from your meeting.

5. Action Items & Follow-Up

Document tasks, who is responsible, and due dates.

Task 1:

Responsible:

Task 2:

Responsible:

Task 3:

Responsible:

Task 4:

Responsible:

Tip: Save a copy of this completed planner with your estate documents so your family can refer to it later.