



WE HELP DEAD PEOPLE &
FUTURE DEAD PEOPLE®

HOW TO TALK WITH YOUR FAMILY ABOUT THEIR ESTATE PLAN

Does your loved one need to create an estate plan? Here are some tips to start the conversation.

1. Choose the right time and place.

- Suggest a calm setting (like over coffee, or during a weekend visit).
- Let them know in advance that you'd like to talk — so they don't feel ambushed.
- Frame it as part of a broader “future planning” conversation, not just about death.

2. Lead with curiosity and care, not fear.

- Focus on care and protection, not fear.
- Examples you can say:
 - “I want to make sure your wishes are carried out exactly the way you'd want them.”
 - “Having a plan in place will make things easier on all of us in the future.”
 - “This isn't just about documents; it's about knowing what you want to happen.”

3. Share your own experience.

- Sometimes, the easiest way to open the door is to share what you've done yourself.
- For example: “We just updated our will and trust, and it made me realize how important it is.”
- Or: “I didn't realize how many decisions go into an estate plan until I sat down with an attorney.”



4. Focus on specific concerns.

- Talk about concrete issues instead of vague statements.
- Who will handle finances or medical decisions if they can't?
- Who will care for minor children or grandchildren?
- What will happen to the house, business, or family heirlooms?

5. Offer support, not pressure.

- Suggest meeting with an estate planning attorney together.
- Offer to help gather documents or make an appointment.
- Remind them they stay in control; the plan reflects their wishes.

6. Know when to pause.

- Not every conversation has to cover everything.
- If emotions run high, pause and revisit the topic later.

7. Bring in a professional (when ready).

- Sometimes a neutral third party makes all the difference.
- An estate planning attorney can explain options clearly, answer legal questions, and turn intentions into legally binding documents.

Need help? Let's Talk.

Starting the conversation may feel uncomfortable, but it's an act of love. By encouraging your loved one to create or update their estate plan, you're helping protect their wishes — and your family's future.

👉 Schedule a FREE discovery call with Goff Legal at (916) 625-6556 or at gofflegal.com.

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