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WAYS TO APPROACH “TOUGH CONVERSATIONS” WITH MOM OR DAD

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When meeting with a wills and trusts lawyer in Charlotte, North Carolina for the first time, many adult children realize that they have no idea where their parents stand in terms of having the right plans in place to protect their assets and wishes if something happens to them.

Do their parents have a will or trust and, if so, where are these and other important documents located? Should assisted living or nursing home care become necessary, what plans are in place to cover the costs? Will mom or dad even have enough money after these costs to carry them through retirement?

These are some very important questions that need to be asked, and an experienced Charlotte, North Carolina wills and trusts lawyer can steer you in the right direction. That being said, no matter how good your relationship is with mom or dad, the subject can be a difficult one to approach.

Perhaps the best place to start is timing. Holidays such as Christmas, Hanukkah and Thanksgiving are known to be stressful times, so avoid these occasions. Current events often present the perfect opening, as there is always some Hollywood legend or financial mogul who dies leaving a fortune for the heirs to squabble over.

Or, the personal experience of a friend or relative can be worked into a dialogue. “So-and-So’s mother was admitted to the hospital recently and no one knew where to find her important papers.” For the adult child who is doing estate planning of their own, it would only be natural to want to discuss their parents’ plans with them during this time.

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For some families, several conversations over a longer period of time might be a better approach. No one wants to feel like they are being told what to do, and money matters are often emotionally charged conversations to begin with.

Remember, advance preparations are in the best interests of the parents, so that *their* wishes can be carried out upon death. Be sure to communicate this from the start to avoid your parents shutting down or getting defensive about the questions you are asking.

Finally, don't forget to include the topic of long-term care in your conversations with mom or dad. While no one likes to think about the possibility of becoming disabled or incapacitated by something like a stroke or Alzheimer's disease, it does happen and it's something that must be planned well in advance for. If you start early enough, Charlotte wills and trust lawyer can help you put the right plans in place to ensure mom or dad's wishes during incapacity are honored and that they won't be forced to sell or give away all of their assets in order to qualify for state or federal assistance.

Are you now ready to help your parents put a rock-solid plan in place that ensures their end-of-life wishes are honored to the fullest? Then be sure to call our Charlotte office for assistance.