

# Your Guide to Navigating Extended Care Conversations with Loved Ones



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# Your Extended Care Conversation Guide

This guide is designed to help you approach one of life's most important talks with clarity and confidence.

- ◆ Tips on how to **prepare** for extended care conversations
- ◆ Lists for **before, during, and after** the discussion
- ◆ Guidance on ensuring every **stakeholder is involved** in the care process



# Why preparation is important

## 01 Clarify Purpose

Taking time to prepare helps you define your goals and guide the conversation in a productive direction.

## 02 Lead with Empathy

Thinking ahead allows you to anticipate emotions and respond with understanding and compassion.

## 03 Communicate Clearly

Organized thoughts and relevant information make it easier to express concerns and encourage open dialogue.

## 04 Ease Anxiety

A clear plan can reduce stress for everyone involved, making the conversation feel more approachable.

## 05 Make Informed Decisions

Being prepared with key documents and facts leads to more confident, well-informed choices.

## 06 Build Trust

Taking the time to prepare shows your loved ones you care, fostering mutual respect and open communication.

# PREPARING FOR THE CONVERSATION

## Preparing with Purpose

Reflect, gather, and set the stage for meaningful conversations

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### Reflect on Your Intentions

- What are your personal goals for the conversation?
- What do you hope to achieve for your loved ones?
- Consider each loved one's personality and anticipate how they may react to the discussion.

### Gather Relevant Information

- Collect medical history and share what you are comfortable sharing.
- Organize existing care plans, if necessary.
- Compile financial documents (e.g., insurance policies, savings).
- Be sure you have the resources and services information on extended care from your financial advisor.
- List any potential questions or concerns you would like to address during the conversation.

### Choose the Right Setting

- Ensure the space is quiet, private, and free from all distractions.
- Consider a comfortable time of day for everyone.
- Ensure all necessary documents are accessible and ready for the conversation.

# STARTING THE CONVERSATION

## Setting the Stage

Schedule, open up, and lead with empathy

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### Schedule Dedicated Time

- Choose a date and time that works for everyone.
- Confirm who will be present during the event and conversation.
- Consider reminding them ahead of time.

### Use Open Body Language

- Practice maintaining eye contact.
- Sit in a relaxed posture to convey openness.
- Use nods and gestures to encourage active participation.
- Smile and maintain composure.

### Start with Empathy

- Prepare a gentle opening statement, such as “I know this is a sensitive topic, but I want to be sure we’re all on the same page.”
- Acknowledge that it may be an uncomfortable conversation.
- Share your own feelings to normalize emotions.

# HAVING THE CONVERSATION

## Engaging with Purpose

Listen, validate, and explore your options together

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### Listen Actively

- Avoid interrupting your loved one when they speak.
- Repeat what they say to confirm your understanding.
- Take notes if needed to remember key points.

### Validate Their Feelings

- Use empathetic phrases.
- Encourage them to express their concerns and fears.
- Acknowledge their experiences.

### Ask Open-Ended Questions

- Ask questions like, “What are your thoughts on our care plan?”
- Encourage discussion by asking how they feel about it.
- Explore hypothetical scenarios to gauge their perspective.

### Anticipate Resistance

- If some are resistant, suggest starting small, like using hypotheticals to ease into the conversation.
- If it becomes too heated or unproductive, suggest pausing and setting a future conversation. Consider a mediator, if necessary.

# HAVING THE CONVERSATION

## Navigating Concerns

Share realities, empower decisions, and secure their peace of mind

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### Discuss Realities

- Gently ask if they've thought about the potential emotional, physical, and financial consequences their care might have on loved ones.
- Share information about your long-term care insurance coverage and potential out-of-pocket expenses.
- Show them a budget outline for these expenses to help them visualize the financial impacts.
- Ensure everyone is aware of existing legal documents, such as advance directives, living wills, etc.
- Take notes if needed to remember key points.

### Encourage Involvement

- Suggest having an open conversation where everyone can discuss how stepping into a caregiving role might affect their time, work, and personal life.
- Promote a "team" approach to care decisions and identify roles.
- Establish an appropriate timeline together.

### Focus on Their Peace of Mind

- Reiterate how planning can reduce future stress.
- Emphasize the importance of aligning your wishes when they have to make care decisions for you.
- Discuss the peace of mind that comes from them knowing plans are in place to support your care.

# AFTER THE CONVERSATION

## Staying Connected

Review your discussion, check in, and seek professional guidance

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## Summarize Key Points

- Review the main topics discussed at the end of the conversation.
- Document any issues, concerns, or decisions that were made.
- Share a written summary with all involved.

## Check In Regularly

- Schedule a follow-up conversation within a few weeks, if possible.
- Allow for ongoing dialogue about feelings and preferences as circumstances change.
- Encourage family members to voice any concerns as they arise.

## Seek Professional Help, if Necessary

- Identify all professionals who can assist (e.g., financial planners, geriatric care).
- Prepare a list of questions for all professionals in advance, before involving them.
- Consider a follow-up meeting with your team of professionals.

# Secure Future Care

with the decisions you make today.

Thoughtful planning helps you and your loved ones prepare for the emotional, physical, and financial changes caregiving can bring.

Let us help you start the conversation.



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