

FREE FAMILY TOOL

Family Care Meeting Planner

Get everyone on the same page, and leave with a plan



1ST ACUVENAS
CASE MANAGEMENT

MEETING DATE

LOCATION / CALL LINK

PERSON WE ARE PLANNING FOR

Who should attend

Agenda

1. How is our loved one doing? What have we each noticed?
2. What does our loved one want? (Their voice comes first.)
3. What help is needed now: daily tasks, appointments, transportation, money, paperwork?
4. Who can do what, and when? Be realistic about time and distance.
5. What outside help or resources should we look into?
6. What decisions need to be made, and by when?

Who is doing what

TASK	WHO	HOW OFTEN / BY WHEN	NOTES
Appointments and transportation			
Medications and pharmacy			
Bills and paperwork			
Groceries and meals			
Check-in calls or visits			
Researching outside help			

Decisions made

Next meeting

DATE

WHO WILL ORGANIZE IT

Family disagreements are normal. A neutral care coordinator can lead the meeting, keep it focused, and write up the plan for everyone.



Need help with the next step? Book a free 15-minute Next-Step Call.

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