

Integrating End-of-life Care Conversations into Professional Services Work: Getting Started

No matter what professional services group you fall under (financial services, legal services, estate planning, insurance) one thing is certain: supporting your clients and their well-being is your top priority. Many professional service groups recognize that integrating [The Conversation Project Conversation Starter Kits](#) and other resources into their practice is one way to support and build deeper relationships with their clients and families. Based on what we've learned from these groups, we've pulled together the following steps to help you get started!

Where can advisors/planners/agents start?

- Start by learning more about [The Conversation Project, kits, videos](#) and other [resources](#).
- Reflect on your own values and what matters most to you, having these conversations with your loved ones to experience this yourself.
- Lead conversations with clients by sharing your own experience; talk about how you have personally had the conversation and make it real. Share (anonymous) stories of other clients.
- Initiate conversations about transition planning right from the start: What if something happens to you? Who will be your person to make decisions on your behalf? Let's bring this person/family in to get everyone on the same page with transition planning.
- Make this part of daily workflow by adding a prompt for end-of-life planning into existing advisor checklists or planning documents/tools; integrate and include steps in writing into existing processes (e.g., create a step in workflow CRM/Sales force tools and/or a trigger in an existing electronic planning system).

What can professional service leadership do to support advisors/planners/agents as they get started?

- Leadership can create peer-to-peer support networks, providing space and opportunities for professional story sharing. When advisors can share their clients' experiences of going through end-of-life conversations with each other, others can understand the potential impact and be motivated to integrate this into workflow.
- Host Conversation Starter Kit workshops with clients and advisors: joint workshops can personalize connections and help advisors witness the value families gain first-hand.
- Provide content and tips for advisors, like this [primer](#) from Fidelity.
- Provide direct-to-client content and tools: don't solely rely on advisors to prompt thinking around end-of-life and transition planning; create resources like this [podcast](#) or website resources like this [page and video](#) to help clients; create e-planning tools that integrate the CSK.

For additional resources and ideas, check out these two case studies from [Argent Wealth Management](#) and [Fidelity](#). For further resources from The Conversation Project, check out our [website](#) or contact us at conversationproject@ihi.org.