

the conversation project

Talking with Your Clients About the Importance of “Having the Conversation”

WHY have this conversation with your clients?

We know from our research that **92% of people think it’s important to have a discussion about what kind of care they would like at the end of their lives**, and yet only **32% of Americans are having this conversation**. It is critical to have this important conversation because half of all people over 65 who are admitted to the hospital are unable to make a health care decision for themselves. Your clients need to:

- Have this important conversation with their families;
- Choose a health care proxy (agent) to make medical decisions in case they are too sick to make decisions for themselves; and
- Make sure their health care team knows their preferences to help ensure that their end-of-life care wishes are honored by the health care system.

WHAT is your role?

You do not have to have the actual conversation about what matters most to your clients at the end of their lives. But you do play a critical role in encouraging your clients to have this discussion with people they trust. We know from our research that the more conversations that take place about “what matters most” to people at the end of their lives, whether it is with their family or those that matter most to them, their doctor, their financial advisor, or their estate-planning attorney, the higher the likelihood that their wishes will be honored. We also know that you have a long-term relationship with your clients and they look to you as a trusted advisor.

WHEN should you have the conversation?

Even if your client is in good health, it’s still important to make sure those that matter to them, and their health care team, know their wishes, since anyone’s health status can change suddenly. It’s particularly important to have the conversation if they or someone they care for has a chronic illness. Every conversation will help those that matter most to them and their care team understand what matters to them. ***The ultimate goal is to have both a financial plan and health care plan in place that will honor your client’s end-of life care wishes.***

We know that starting this conversation may not be easy for you. Here are some suggestions about how you might begin:

“As your financial advisor, it is important for me to take a comprehensive look at what matters to you throughout the course of your life. One critical area I’d like to explore is if you have thought about the kind of care you might want at the end of your life. And if you have chosen a health care proxy (agent or decision-maker) to make medical decisions for you if you become too sick to make them for yourself.

The reason for this is because half of all people over 65 who are admitted to the hospital are unable to make a health care decision for themselves. I want to make sure that if this happens to you, you have someone to speak on your behalf.

From my personal experience with my _____ [mother, father, friend, sibling], having this conversation about their end-of-life care preferences really helped us when we had to make decisions. We knew what mattered most to them.

OR

From my personal experience with my _____ [mother, father, friend, sibling], I’m really sorry we never had the conversation about their end-of-life care preferences. Not being clear about what mattered most to them made things complicated.

I would like to share with you three resources: the **Conversation Starter Guide** to help you bring this topic up with those that matter, **Choosing a Health Care Proxy** to help you pick an advocate who could speak for you — and help you have a say in your health care, and **Being a Health Care Proxy**.

I’d love to get back in touch with you in several months to see if you were able to have these conversations and learn how these conversations went with you and your family. Would that be okay with you?”

Contact Us

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