

## 10 Common Myths About Family Meetings



When you hear “family meeting,” what comes to mind? Tense discussions, awkward silences, or heavy topics? You’re not alone—talking about things like inheritance, family values, or legacy planning can feel unsettling or intimidating. It’s no wonder we often shy away from these conversations.

But family meetings don’t have to be about crisis and conflict—they’re an opportunity to strengthen connections, help everyone feel heard, and tell your family story. Reflecting on where you’ve been and where you’re headed can strengthen shared values and guide important decisions. Rather than something to avoid, family meetings can become a powerful way to connect.

### Why Families Hesitate: 10 Common Myths

Here’s a look at 10 common myths about family meetings and how you can reframe them to make these discussions feel possible for you and your family.

#### **MYTH 1: THEY’RE ONLY ABOUT SERIOUS, HEAVY CONVERSATIONS**

**Reframe:** Family meetings don’t always have to be intense. They’re a chance to share your family story, revisit shared values, and discuss lighter topics like family traditions, cherished memories, or vacation plans. Including a mixture of both heavy and light topics—can help keep things balanced and engaging, fostering a deeper connection across generations.

#### **MYTH 2: THERE MUST BE A CRISIS INVOLVED**

**Reframe:** Waiting for a crisis like a health event or passing of a loved one makes these conversations more stressful. Family meetings are most productive when they’re proactive, not reactive. Addressing life’s inevitable challenges early, when things are calm, can provide a new sense of comfort, control, and clarity about what’s ahead.

#### **MYTH 3: THEY DON’T WORK FOR OUR FAMILY**

**Reframe:** Just because a past meeting or conversation didn’t go well doesn’t mean they’re all destined to fail. Whether you felt tense, misunderstood, or simply unproductive, remember that past experiences don’t define future outcomes. With proper structure, clear expectations, and perhaps some guidance from a trusted third party, family meetings can be collaborative, productive, and even transformative.

#### MYTH 4: WE HAVE AN ESTATE PLAN, SO WE DON'T NEED A FAMILY MEETING

**Reframe:** Even the best legal documents and clearly defined estate plans need context. Family meetings give you the opportunity to explain the reasoning behind your plan and why it matters. When everyone understands the purpose behind your decisions, they're more likely to support and carry them out as you intended.

#### MYTH 5: THEY'RE TOO TIME-CONSUMING

**Reframe:** Productive family meetings don't need to be long. A focused, hour-long conversation can be just as effective in building alignment and understanding as a daylong retreat. The key is clarity, structure, and a commitment to open communication.

#### MYTH 6: IT'S TOO SOON TO INCLUDE YOUNGER FAMILY MEMBERS

**Reframe:** Family meetings are an important opportunity to bridge generational divides as soon as possible. When younger generations are included in these conversations, you help ensure they understand the family's values and decisions. It gives them a voice in shaping the future and carrying your family legacy forward with intention.

#### MYTH 7: AVOIDING TOUGH TOPICS HELPS US KEEPS THE PEACE

**Reframe:** Avoiding difficult conversations only postpones the inevitable. So, believe it or not, addressing hard topics head-on doesn't create conflict—it prevents it. Over time, unresolved issues can lead to misunderstandings, resentment, and even greater challenges down the road. Family meetings provide a safe, structured space to have meaningful, necessary dialogue before problems arise. This helps instill family harmony and empowers those who follow you to navigate and solve problems together.



## MYTH 8: WE'VE ALREADY TALKED ABOUT THAT

**Reframe:** Just because you've talked about something once doesn't mean everyone is on the same page about it. Think about a game of telephone: Relying on one person to pass along information you've shared with them can create lots of confusion and unnecessary misunderstanding. Hearing about a crucial topic directly from you keeps things clear and transparent.

## MYTH 9: WE CAN'T TALK ABOUT MONEY

**Reframe:** In many families, financial discussions have never been a part of tradition. Your parents or grandparents may have felt that money matters were personal and should stay private, even from family members. It may be new or uncomfortable to start opening up about your intentions around money, but it creates clarity that can protect your family story and eliminate emotional upset. A family meeting is an opportunity to safely share, making sure no one feels like they're in the dark about decisions that affect the whole family.

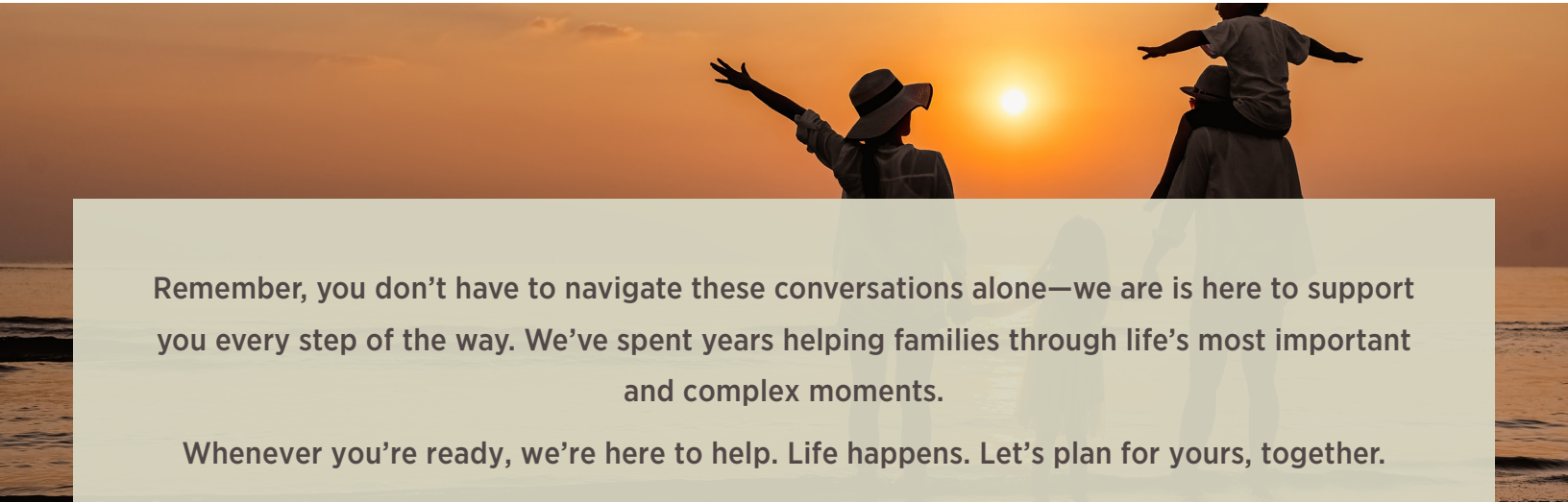
## MYTH 10: ONE CONVERSATION IS ENOUGH

**Reframe:** Family meetings aren't one-and-done. It's easy to think that one big conversation is enough to cover everything, but family dynamics and circumstances change over time. Even if a topic has been discussed once doesn't mean it's settled for good. Regular check-ins allow your family to adjust to new realities and stay connected as life happens.

## Start Shaping Your Family's Future Today

Family meetings are about progress, not perfection. Whether you want to discuss your family's legacy, shared goals, or simply check in, these conversations are an opportunity to bring everyone together. They can foster connections, align intentions, and create an evolving roadmap for your family's future.

So, the next time the idea of a family meeting feels too heavy or complicated, remember: it's simply a time to talk. And often, that discussion will leave everyone feeling lighter, closer, and more connected.



Remember, you don't have to navigate these conversations alone—we are here to support you every step of the way. We've spent years helping families through life's most important and complex moments.

Whenever you're ready, we're here to help. Life happens. Let's plan for yours, together.



## DISCLOSURES

*6 Meridian is a group comprised of investment professionals registered with Hightower Advisors, LLC, an SEC registered investment adviser. Registration as an investment advisor does not imply a certain level of skill or training. Some investment professionals may also be registered with Hightower Securities, LLC, member FINRA and SIPC. Advisory services are offered through Hightower Advisors, LLC. Securities are offered through Hightower Securities, LLC. All information referenced herein is from sources believed to be reliable. 6 Meridian and Hightower Advisors, LLC have not independently verified the accuracy or completeness of the information contained in this document. 6 Meridian and Hightower Advisors, LLC or any of its affiliates make no representations or warranties, express or implied, as to the accuracy or completeness of the information or for statements or errors or omissions, or results obtained from the use of this information. 6 Meridian and Hightower Advisors, LLC or any of its affiliates assume no liability for any action made or taken in reliance on or relating in any way to the information. This document and the materials contained herein were created for informational purposes only; the opinions expressed are solely those of the author(s), and do not represent those of Hightower Advisors, LLC or any of its affiliates. 6 Meridian and Hightower Advisors, LLC or any of its affiliates do not provide tax or legal advice. This material was not intended or written to be used or presented to any entity as tax or legal advice. Clients are urged to consult their tax and/or legal advisor for related questions.*