

Conversation Primer

What to Say When You Need Answers

When something feels wrong, knowing how to ask questions can make all the difference. The goal is clarity rather than confrontation. These scripts help you gather information while keeping conversations calm.

Start With the Right Tone

Before the words, focus on how you say them:

- **Be calm and direct** – You're asking for information, not making accusations
- **Stick to facts** – Avoid assumptions or emotional conclusions
- **Use neutral language** – "Help me understand" goes further than "Why did you..."
- **Pause and listen** – The response often tells you as much as the answer

A steady, reasonable approach protects both relationships and your credibility if issues need to be addressed later.

What to Watch For

It's not just what people say, it's how they respond:

Healthy, cooperative behavior:

- Answers your questions directly
- Provides documents or explains how to get them
- Follows through on what they say

Concerning patterns:

- Repeated delays or vague promises
- Changing explanations
- Refusal to share basic information
- Pressure to act quickly

Documents

Questions

- "Can I see the will and any recent estate planning documents?"
- "Do you know where the original documents are kept?"
- "Was anything updated recently?"

Reasonable response:

- "Yes, here's a copy," or "They're with the attorney, I'll request them."

Possible deflection:

- "You don't need to worry about that right now."
- "We'll deal with that later."
- Repeated delays without a clear explanation

Authority

Questions

- "Who currently has authority to act on behalf of the estate?"
- "Has a personal representative been named or appointed?"
- "Was anyone acting under a Power of Attorney before death?"

Reasonable response:

- Clear explanation of roles, with documents or next steps to confirm

Possible deflection:

- Vague answers like "I'm handling it" without explanation
- Avoiding the question or changing the subject

Finances

Questions

- "Can you help me understand these account balances?"
- "Were there any recent large withdrawals or transfers?"
- "Where are the main accounts held?"

Reasonable response:

- Willingness to review statements or explain transactions
- Openness about where information can be verified

Possible deflection:

- "That's private" (when you have a legitimate interest)
- Inconsistent explanations
- Refusal to provide any documentation

Changes

Questions

- "Were there any changes to the estate plan in the last few months?"
- "Who was involved in making those changes?"
- "Was an attorney or advisor involved?"

Reasonable response:

- Clear timeline and explanation of changes
- Identification of professionals involved

Possible deflection:

- "I'm not sure" (when they likely would know)
- Avoiding details or giving conflicting information

Ready to take the
next step?

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