

OASIS · AT A GLANCE

Sibling Caregivers and the Conversation That Must Happen

How adult siblings end up in caregiving roles, why the planning conversation gets postponed, and the shared structure that prevents the worst outcome: a grieving sibling discovering on Wednesday morning what nobody told them on Tuesday afternoon.

BY JIM PALASTY · OASIS FOR AUTISM · 9 MIN READ

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CONVERSATION OWED

One family meeting, on the calendar, before anything happens. The siblings have a right to know what is being asked of them, and what is not.

How it works

THREE STEPS

Put it on the calendar

Two hours. With food. With a written agenda. Everyone in the room or on video. Ninety days out, minimum.



Walk through the plan

Letter of intent, legal documents, financial picture, named successor roles. No surprises. No skipping pages.



Confirm the roles

Each sibling consents to or declines a specific role. In writing. Not assumed. Not implied. Not inherited.

What the meeting agenda covers

Identity	Who the adult is, current legal status, current supports in place
Letter of intent	Walk through the seven sections together, page by page
Legal stack	Trust, guardianship, POAs, SDM, healthcare proxy, rep payee
Financial picture	Assets, benefits, special needs trust funding, insurance
Named roles	Trustee, rep payee, guardian, healthcare proxy, SDM supporters
Sibling consent	Each role, each sibling, in writing, with a backup named
Annual review	When and how the family will revisit, calendar entry set today

WHAT IT LOOKS LIKE

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My brother and I had been planning for almost two years before my dad's stroke. We knew who held the trust. We knew which one of us was on the SDM agreement. We knew our sister would stay in her apartment with the same DSPs, paid by the same special needs trust, with the same routines. The night of the stroke I drove our sister to my apartment and slept in the next room. There was no surprise. There was just a hard week.

ROBIN, SAGINAW

What matters, at a glance

Surprise guardianship

A sibling discovers at the funeral that they have been named guardian without ever being asked. Treat this as the worst outcome and design the conversation to prevent it.

The conversation no one schedules

Most families talk about everything but this. Set a date. Put it in writing. Do it twice if you must, but do it once at minimum. Repeated annually is better.

Domain-by-domain roles

Different siblings can hold different responsibilities. Healthcare, finances, housing, social. The legal stack lets you split the work across willing hands.

Planning runway

Schedule the meeting at least ninety days out. Less than that and someone will not be able to attend. The siblings whose voices matter most are usually the busiest.

The right to refuse

Siblings have lives, marriages, careers, kids. A sibling who cannot or will not take on a role has the right to say no without penalty, without guilt, and without lasting consequence to the family.

Backup successors

No single sibling should be the only successor. Name primary, secondary, tertiary. Build the bench so the order does not collapse on the day someone moves to Phoenix.

BRING THESE · CHECK AS YOU GO

☐ Family meeting date scheduled

☐ Letter of intent reviewed by all

☐ Sibling roles named and consented

☐ Annual review date scheduled

☐ Agenda sent in advance

☐ Legal stack reviewed by all

☐ Backup successors named

☐ Written summary distributed

YOUR MOVE

When you have not had the conversation yet

- 1 Pick a date in the next ninety days. Put it on the calendar. Send the invite tonight.
- 2 Send the agenda one week ahead. Letter of intent attached. Legal stack summary attached.
- 3 Run the meeting. Two hours. Take notes. Capture every consent and every decline.
- 4 Convert verbal consents to signed roles within thirty days. Notarize what your state requires notarized.
- 5 Set the next annual review on the calendar before everyone leaves the meeting.

The conversation is the legacy. The legal documents only execute what the conversation already decided.

RESOURCES NAMED IN THIS POST

oasisforautism.com · <https://oasisforautism.com>

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ABOUT THE AUTHOR



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