# Beneficiary Support Toolkit for Trust Professionals

# Chapter 1 Resource

**Sample Check-in Questions**

**Identifying Changes in a Person’s Life**

* How are you doing?
* What’s new with you?
* How is your family or staff?
* How is your home and your roommates?
* What’s going on in your life?
* Has anything big happened recently?
* Are there things that are going on that you are worried about?

**Learning About Changing Needs or Goals**

* Last time we talked, you were looking forward to [goal]. How is that going?
* What are your big plans for the future?
* Are there things that you want to do but are not doing right now?
* Are you still doing [goal or activity]? How is that going? Do you want to do more or less of that?

**Identifying Changes in Communication Preferences**

* Last time we talked, you wanted to chat mostly by [communication method]. How is that working for you?
* Right now, we share information with you and with [supporter]. Is this still a good person to share information with? Are there others we should also share information with?
* Do you feel like you are getting the information you need from us?
* Are there ways we can connect better in the future?

**Learning About Potential Future Issues**

* Are there things that may happen in the future that you are thinking about? Good/bad things? Things that you worry about?
* How are you feeling about your home?
* How is your family doing? Is everyone healthy?
* How is your job or work going? Do you have a good relationship with your supervisor?
* How is your relationship with your friends or [name of significant other]? Is everything going well there?
* Are you getting the help you need each day? How is your relationship with your staff?
* Are there things that are making you uncomfortable or unhappy?

**Asking About Satisfaction With Trust Services**

NOTE: You may or may not want to ask questions on satisfaction. But, if you choose to do so, here are some sample questions to consider.

* Are you happy with the help you get from us at the trust?
* Are there ways we can be communicating better?
* Are you and your family happy with the process for asking and getting money from the trust?
* Is there anything else we can be doing to help you?

**Share With Us**

Did any of these tips and resources spark a memory or story you want to share, or a resource or tool you need? [Complete this form to contact us and share your ideas](https://thearcus.surveymonkey.com/r/7F5N5DC)!

Date Revised: August 4, 2021.

