

# **Families and Personal Property Inheritance: A Top Ten List for Decision-Making**

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1. Recognize that decisions about personal belongings are often more challenging than decisions about titled property. Assuming such decisions are unimportant or trivial can lead to misunderstandings and conflicts.
2. Recognize that inheritance decisions can have powerful consequences—emotional as well as economic. Decisions about personal property involve dealing with emotional and potential financial value connected to objects accumulated over a lifetime and across generations of family members.
3. When decisions are made prior to death, the decisions can reflect the owner's wishes, and special memories and stories may be shared. Planning ahead versus waiting until a crisis or death offers more choices and a chance for thoughtful communication.
4. Issues of power and control do not disappear in inheritance decisions. Unresolved conflicts among parents, adult children, siblings, and others are often at the heart of what goes wrong with inheritance decisions. Listen for feelings and emotions, watch for blaming, and determine if you can agree to disagree if conflicts arise.
5. Remember that different perceptions of what's "fair" are normal and should be expected. Those involved need to uncover the unwritten rules and assumptions about fairness that exist among family members.
6. Being fair does not always mean being equal. In fact, dividing personal property equally is sometimes impossible.
7. Individuals who have input and agree on how decisions are made are more likely to feel the outcomes of those decisions are fair.
8. Discussing what those involved want to accomplish helps reduce mistaken assumptions, misunderstood intentions, and makes choosing distribution options easier.
9. Identifying items that have special meaning can help avoid inaccurate assumptions about who should get what. Not everyone will find the same items meaningful.

10. Putting wishes in writing, typically in a separate listing mentioned in a will, reduces the dilemmas and decisions for estate executors and surviving family members.

## **Here's Help**

Help is available to jump-start planning and action regarding inheritance decisions in, "Who Gets Grandma's Yellow Pie Plate?<sup>TM</sup> Workbook: A Guide To Passing on Personal Possessions." The workbook is a step-by-step guide filled with worksheets, practical suggestions, proven strategies, and real-life stories. To order call 1-800-876-8636 or place an order on [www.yellowpieplate.umn.edu](http://www.yellowpieplate.umn.edu). (\$12.50 plus shipping and handling)

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