# Enterprising Rural Families™

*An Online Newsletter April, 2013 Volume IX, Issue 4*

**This newsletter is an instrument of the *Enterprising Rural Families: Making It Work* program of University of Wyoming Extension. For further information concerning the Enterprising Rural Families program or on-line course contact *information@eRuralFamilies.org* or go to *http://eRuralFamilies.org/*.**

---

### TIP OF THE MONTH:

#### GENERATIONAL DIFFERENCES

Generational differences can cause conflict in the workplace.

**Veterans or Traditionalists:** born early 1900's to end of World War II; want to build a legacy; expected to build a career with one employer or in a single field; want to make lasting contribution; want support and approval of employer in transitioning to retirement; strong, silent types that rarely give praise, but mean it when they do.

**Baby Boomers:** born 1946-1964; grew up in sixties and felt compelled to change society; question where they've been and where they're going; most hang on to idea of a stellar career; have realized there just isn't enough time for everything and want help attaining balance; forced traditionalist bosses to open up and provide more feedback.

**Generation X:** born 1965-1980; want a portable career, not strongly loyal to a particular employer; constantly reviewing and revising career plans; now have small children and demand time to spend with families and life issues; want instantaneous feedback on the job.

**Millennials:** born 1981-1999; just entering workforce; grew up multi-tasking and interested in parallel careers; over-programmed with concept of balance drummed in by Boomer parents; unknown what they expect of workplace feedback.

## WHO GETS MY PERSONAL STUFF? (Part 2)

## Transferring Personal Property

**By Bill Taylor, University of Wyoming, Northeast Area Community Development Extension Educator**

We all have personal items that are important or precious to us or to those that are associated with us. In estate planning, personal items are often ignored, yet they may cause some of the most significant emotions and conflicts. We examined some of these issues and how to deal with them in Part 1. Let us now go on to the completion of the process.

### Inventory

Once the family has reached some degree of consensus or agreement on their values and goals in disbursing personal items, it is time to take inventory of the items that need to be distributed. This is not a simple task if a distribution plan is being considered for an entire household. As indicated previously, the owner of the property may feel like they don't have much to give away. "What?! These old things?" However, when it comes to listing everything that may be of interest to potential recipients, don't overlook the many small and personal items that may hold memories or significance to them. In fact, just as when discussing the family goals and values, it is best for the owners and potential recipients to go through the items together to develop the list. If there are too many grandchildren, nieces, and nephews to include, then consider including all the children at least, or another representative of each household or branch of the family.

Make several copies of a personal property inventory form or start one on a pad. Start in one location, such as one end of the house, the upper bedroom, the basement, etc. and work to the far end of the house. Be sure to list the owner's name, the location (house, storage shed, garage, etc.) and the date. List the room where each item is found and a description. Leave the last two columns titled "Requested By" and "Agreed Receiver" until later. At this point you are just developing as complete a list as possible.

After listing all the items in the house, apartment, or other living quarters, move on to other facilities such as storage sheds, garage, barn, rental storage, etc. and continue your list until it is complete.

**Request of Items**

Once a listing of personal items has been developed it is time to allow potential recipients to request those items they might prefer, and for the present owners and/or administrators to determine who will actually be designated to receive various objects.

A variety of methods may be used at this point. One possibility is for participating family members to decide who gets the list for review and requests. It may be the siblings only, or siblings, spouses, and grandchildren, or whatever combination makes sense to the family. As in all these proceedings, if the parents or person who owns the personal property is of sound mind, they have the right to make the final decisions. However, the input of other family members should be encouraged. After copies of the inventory list have been distributed to those agreed upon, they should mark which items they are interested in receiving by listing their name in the "Requested By" column and returning it to the family member(s) or administrator that will be compiling the requests. Transfer all the requests to one master list. Some items may have no one or only one person interested. These provide easy decisions for those distributing the property. On the other hand, some items may be requested by several persons. These decisions will be more difficult and may take some time to settle.

Another possibility is for the property owner(s) to make all the decisions about who receives what without distributing the list for requests. This method is usually less desirable because it does not allow family members to share what is important to them and why. The person(s) distributing the property is/are only guessing, based on their suppositions of what their heirs would like.

There are several methods which can be used to allow potential recipients to participate in the process of determination of how items are distributed, especially for those items that are desired by more than one. In using these methods, distribution may take place item by item, or items can be placed in groups of approximately equal value.

**Shake dice:** Family members shake dice and the high roller receives first choice, next highest gets second choice, etc. After making a complete round, reverse the order of choice. After the first two rounds are complete, shake the dice again to determine a new order.

**Draw:** Each draws a number, straw, card, etc., which then determines choice order as with dice.

**Private auction:** Family members buy items in open auction, using real money or equal amounts of "funny money" such as play money, marbles, or chips. If real money is used, the proceeds go to the owner or their estate. Using real money allows wealthier family members to outbid others, which may make for hurt feelings.

**Silent auction:** Written bids are placed on items and the highest bidder gets the item. The money generated goes to the owner or estate. Again, using real money allows wealthier family members to outbid others, which may make for hurt feelings.

**Grouping preference:** Selection begins with oldest and proceeds to youngest or vice versa; males go first, then females or vice versa; or the two may be integrated.

**Generation preference:** Priority is given to parents, siblings, children, grandchildren, blood relatives, etc.

Other methods of distribution which may be used are public auction, yard sale, or estate sale, with the proceeds going to the owner and estate or being divided according to an agreed on formula between the owner and heirs.

**Legal Transfer**

Once a determination has been made by the property owner or administrator concerning who will receive which item, a couple of methods may be used to actually assure transfer of items to the proper recipient. One method is to actually gift the items at the time of decision, so that they no longer belong to the original owner, but are taken by the person to whom they were given.

If the original owner is still living, he/she usually does not want to give away all personal belongings at this point. Therefore, the owner needs to complete a legal document called a *Personal Property Memorandum* to make his/her distribution decisions binding. This document must be referred to in the owner's will and should be on file either with the will or other important documents. Each item that is to be distributed to a specific individual should be listed, along with the name, address and relationship of the person receiving the item. Each page must be dated and signed for the document to be legally binding. Once the personal property inventory has been completed and the owner and/or administrator has made a determination of who is to receive each item, complete and file the *Personal Property Memorandum* with other estate documents to complete the process. If items are subsequently added or removed from the property owned, those changes will need to be made on the *Memorandum* and a new page signed and dated.

**The above guidelines were written for Wyoming and state statutes will vary.** It is best to have this form one prepared by the attorney preparing the will for the property owner.

**Agree to Manage Conflict**

As indicated at the beginning of this section, conflicts and disagreements can arise during this process, even under the best of situations and with families having healthy relationships. Be committed not to let stress and conflict destroy your family and your relationships. No object, no matter how precious, is worth that.

When conflicts do arise, have a plan for dealing with them. The possibility of conflicts and how to handle them should be discussed at the beginning of the process, before they arise, not when emotions have gotten heated.

Conflict management can be a whole course in itself, and we will not try to address the subject in depth here. However, it is important to realize that conflict is a normal part of life and is not necessarily "good" or "bad," but merely reflects lack of communication, miscommunication, or differences in values, beliefs, or expectations. Often these conflicts are heightened by prior conflicts that have been unresolved, with each additional difference tending to escalate the intensity of the issue.

Most conflicts can be resolved by proper listening skills, and making statements about how we feel, rather than making statements about the motives of others. Work at listening skills like eliminating distractions, keeping eye contact, facing the speaker, keeping a comfortable distance, and listening for feelings and facts rather than using their speaking time to frame your reply or counter-attack. Practice reframing what you thought you heard back to the speaker to see if they really meant what you think you heard. When you express your side of the issue, try to stick to statements that reflect *your* understanding of the problem, how it makes you feel, and what effect the behavior of others has on you. Try to continue the discussion without assigning blame until each side has had an opportunity to express their views and feelings. Then see if you can be creative enough to come up with suggestions and/or solutions that might address the issue in such a way that all can receive some satisfaction.

If the conflict cannot be resolved, then consider bringing in a facilitator or mediator that may help to bring objectivity to the process. Friends or acquaintances or other non-family members may work, but sometimes they are often too involved with family members, or inexperienced in negotiating conflict, to appear or be impartial. Consider using a professional mediator or other person that has been trained in reconciling conflicts to help you through to consensus.

Some of your alternatives to working out conflicts are to completely give in to others, become the overbearing one and demand your way, become completely embattled as a family, or go to court. None of these outcomes are desirable and are the breeding ground for bitterness, hurt, and destroyed relationships and dismembered families.

**Completion Steps**

As you bring the process of determining distribution of "my important stuff" to a close, there are some final steps that should be considered.

Be sure that all the legal documents, including will and personal property memorandum are in order and properly filed with attorney, administrator, in a safe deposit box, etc. Be sure someone else knows where these documents are filed and has access to them. This is usually the person(s) named in your will as executors of the estate.

Share the outcome of the process with family and other concerned persons, unless it would cause more family turmoil. Doing this personally, rather than waiting until the list is divulged upon your death, will help to minimize misunderstandings. Remember that one of the purposes of estate planning is to reduce the pain, stress, and suffering of heirs after you are gone.

If you have chosen gifting of important items before your death as one of your distribution methods, start the process. Decide whether you want to use special occasions like birthdays or Christmas as a vehicle to make the gifts, or whether you would like to develop your own schedule.

Since family heritage, culture, and continuity are important, and one of the basic reasons for distributing personal property, tell stories as you give away items that are important to you. Explain why these things are important, what they mean in family history, and what you feel you are passing on to recipients when you give them away. Story telling might become a family tradition as various items are passed down to those who will own them next.

As situations and family members change, as items are gifted and/or acquired, be ready to revisit and update your decisions. If you do make changes, be sure those are reflected in your personal property memorandum.

---

**Resource:** *Who Gets Grandma's Yellow Pie Plate? A Guide to Passing on Personal Possessions* (1999) University of Minnesota. MI-6686-WG. 800-876-8636. www.yellowpieplate.umn.edu/