

WHO GETS GRANDMA'S YELLOW PIE PLATE?

Today's Presenters:

Teresa Hatfield, Meadowlark

District Extension Agent

Melinda Daily, Sunflower District

Extension Agent

We will begin at 12:10PM



Today's Guide for a Healthy Conversation:

Be respectful and open to others.

**Please type your questions in the Q&A box
and comments into the chat box for our
moderators.**

**Today's session will be recorded and will
be posted to our Living Well Wednesday
web page at**

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**LIVING WELL
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K-State Research and Extension Webinar Series



United States Department of Agriculture



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Form AD-3027-A--Revised/Preface/Revised July 2018

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Alfabetización al Formulario AD-3027-A / Revisado: julio 2018

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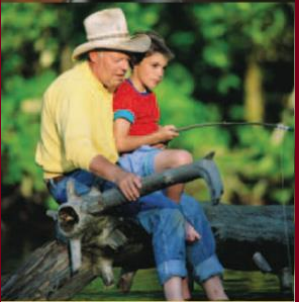


Who Gets Grandma's Yellow Pie Plate

Families and Inheritance Decisions



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“Your pie plates may not be round, and they may not be yellow; but every family has its pie plates.”

Decisions about *both* titled and non-titled property are important.

A majority of adults have NO written will or property wishes.

Then what happens?



Role of Possessions

“My Mom’s funeral was a piece of cake compared to cleaning out the family home and closing the door for the last time.”

“Divide my personal belongings
evenly among my children.”



Caution

Families and Inheritance



- Not simply an economic or legal issue.
- Objects tied to remembering and respecting family member, family history, rituals, traditions, and relationships.
- “Holding on” and “letting go” are as much about memories and grieving the loss of the owner and complex family relationships as about objects.

Powerful Messages — Intended and Unintended

- Who gets what, when and how can destroy or enhance family relationships.
- Symbols of trust, love, power, control, favorites, reward and punishment.
- Insight into contemporary family relationships (who counts, boundaries, quality of relationships).



Six Key Decision-Making Factors

- Sensitivity of issue
- Lack of goal discussion
- Different perceptions of “fairness”
- Different meanings of objects
- Lack of awareness of distribution options and consequences
- Potential for conflict



What Makes Inheritance Such a Sensitive Issue for Families?

Recognize the Sensitivity of the Issue

- Denial of mortality — your own and others’.
- Potential for conflict.
- Family secrets and boundaries may be disclosed — who is in and out?



Fear How Motives Will Be Interpreted

- Receivers just greedy or want control.
- Givers may be surprised, dismayed, and hurt by responses from intended recipients.
 - ✓ “I don’t have room for anything Mother.”
 - ✓ “We already have a full house.”
 - ✓ “It’s just not something I would use.”
- Fear keepsakes will just be sold.



Breaking the Silence

- Determine who needs to talk:
 - ✓ Spouses/partners
 - ✓ Siblings
 - ✓ Across the generations:
 - Adult children and aging parents





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Identify and Prioritize Goals

- Maintaining privacy?
- Protecting or improving family relationships?
- Being fair to all involved?
- Preserving memories?
- Contributing to society?





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“I Just Want to be Fair ”



Family members have different “rules” or perceptions of what is fair regarding:

- The *outcomes* or who gets what personal belongings.
- The *process* of how personal belongings are distributed.

When the “rules” are violated, decisions are considered unfair!

A Winnie the Pooh Book

Three siblings:

- Oldest daughter, 48, divorced and remarried with 2 step-kids she's raising
- Daughter, 46, single
- Son, 44, married with one child
- Who should get the book and why?
- What would be fair?
- What rules might be used?

Common Transfer Rules

- Equality — treating everyone the same.
 - ✓ Equal number of items
 - ✓ Equal “value”
 - ✓ Equal chance to purchase



Common Transfer Rules

■ Equitable — takes differences into account

✓ Needs

✓ Personal Characteristics

- Personal interest in item
- Birth order
- Gender
- Grandchildren
- Marital status
- Biological, step children/grandchildren



Contributions (Gifts, Informal Help, Money, Love, Emotional Support)



“In my family everyone knows that you get back gifts you’ve given when someone dies — except for money and time, that is. I’m the daughter who lives near Mom and Dad and takes them to their doctor appointments, cleans their house, and helps them out financially, when it’s needed. My sister from back East is always sending expensive gifts for birthdays and holidays. Who do you think will get back the most when Mom and Dad die?”

Is the Process Fair?

- Participation: Who's in or out
- Neutrality: Level playing field, consistency
- Ethics: Respect and dignity (how treated)
- Information: Accurate, complete
- Structure: When, where, how
- Ability to correct process if there are problems

When a Process is Judged Unfair

- It lacks accuracy (information, value, meaning).
 - ✓ “Grandmother promised a certain rocker to a grandchild, but an aunt insisted she was taking it no matter what.”
- Moral or ethical standards are not followed.
 - ✓ “One of my sisters took items when she thought none of us were looking.”
- Not everyone has a voice in decisions,
 - ✓ “The most dominant personalities walk off with everything they want and the others are left with things they don’t want.”

When a Process Is Judged Unfair

- Rules are not consistently followed.
 - ✓ “My brother was in the garage taking tools when we sisters returned from the church after the funeral.”
- Not representative of sub-groups.
 - ✓ Siblings (adult children)
 - ✓ In-laws
 - ✓ Grandchildren
 - “I was sent to represent my husband when things were doled out before the sale and was told I wasn’t included because I was an in-law.”

Reminders for Negotiating Fairness

- Different perceptions of what's "fair" are normal.
- Talk about what "fair" means to your family.
 - ✓ Fair outcomes
 - ✓ Fair processes
- Determine where family members agree or disagree.
- Reduce misunderstandings, inaccurate assumptions.





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Objects have different meaning and value for different individuals.



Avoid Inaccurate Assumptions!

- Identify items that have special meaning.
 - ✓ What items?
 - ✓ Why important to you or others?
 - ✓ Who should receive and why?
- Share stories about meaning.
- Celebrate a person's life — memories, traditions





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Consider Distribution Options and Consequences



- There is no one perfect method of transfer.
- More transfer options are available when planned prior to death.
- Each method of transfer has consequences.
- Stay focused on your goals.
- Understand your state inheritance laws.

Create a Separate List

- To identify who should get what personal possessions
- Mention list in your will
- Verify with legal expert



Sample of a Separate List

To: My Family, Heirs, Executor, or Personal Representative

This is the list that I referred to in my Last Will and Testament. Therefore, please distribute the items listed below to the persons I have named:

Item: _____

To Be Distributed To: _____

Grandfather's clock (from living room)

My sister, Susan Anderson Jones

**Grandfather's woodworking tools
(from basement)**

My brother, George J. Anderson

My collection of flower vases

My sister Susan's son, Bill A. Jones

My Signature (Testator): _____ **Date:** _____

Options Have Consequences

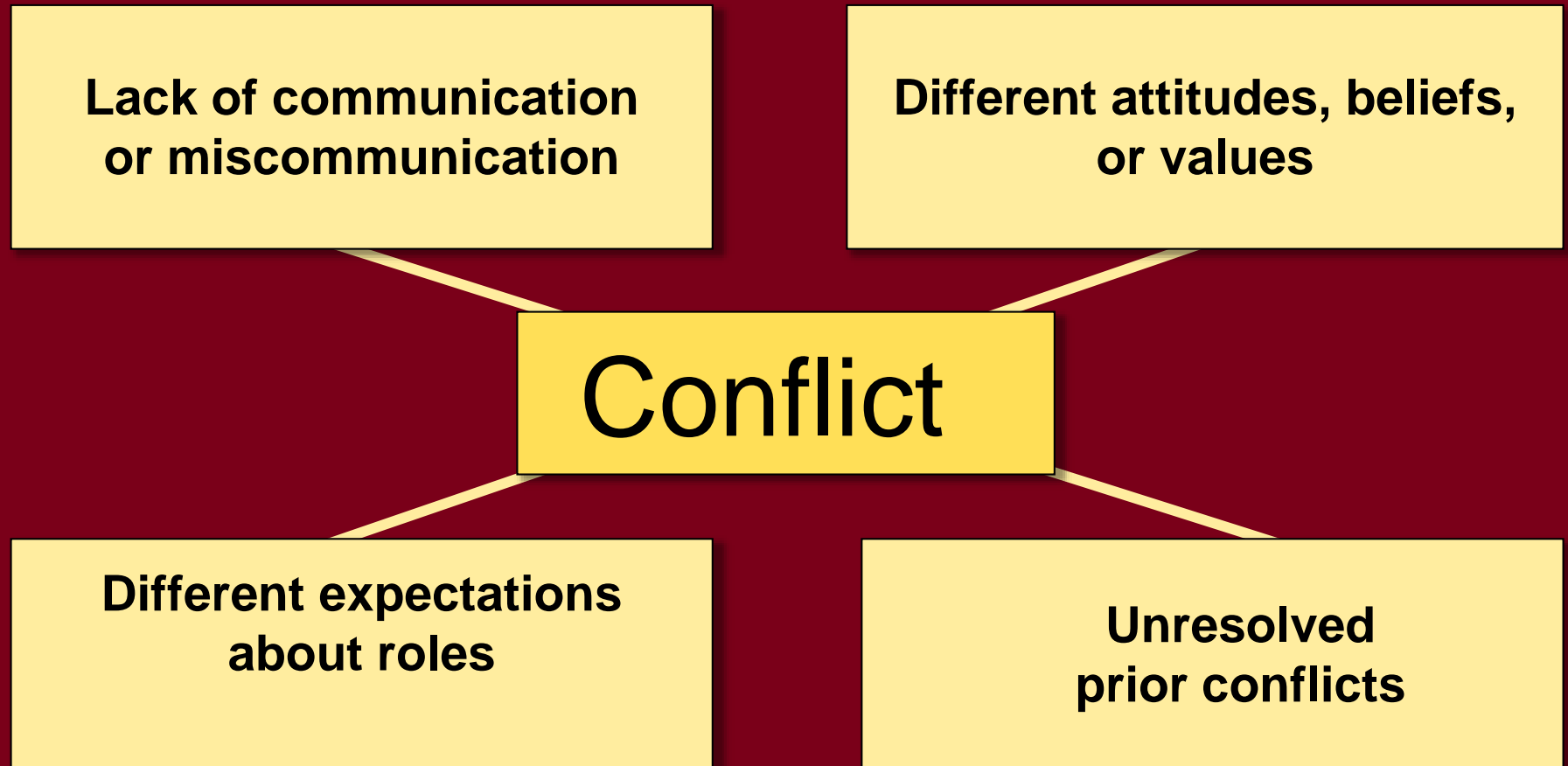
- Gifts
- Verbal or “someday” promises
- Masking tape, labeling items
- Public auction
- Auction within family
- Pilfering items
- Donating
- Doing nothing
 - ✓ State intestate and succession laws apply.
 - ✓ Non-titled property is part of one’s estate.





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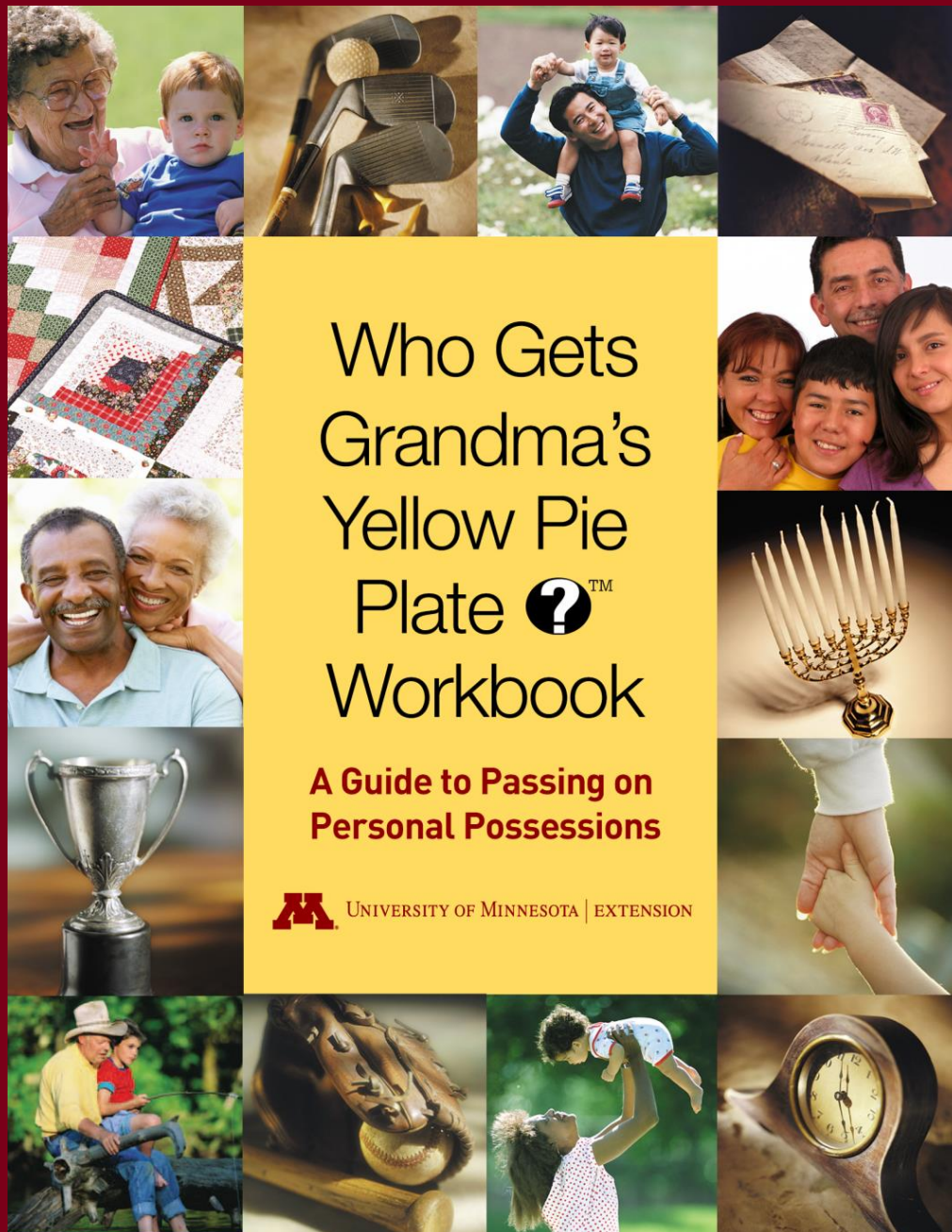


Managing Conflict

- Communicate and be transparent in words and actions.
 - ✓ Being above board with everyone involved.
- Respect property owner's right to decide.
- Agree to disagree.
- Involve mediators or third parties.

Proven Strategies to Help You and Your Family Members

- Recognize sensitivity of issue.
- Determine what you want to accomplish.
- Decide what's "fair" in the context of your family.
- Understand belongings have different meanings to different individuals.
- Consider distribution options and consequences.
- Agree to manage conflicts if they arise.



Who Gets Grandma's Yellow Pie Plate TM? Workbook

**A Guide to Passing on
Personal Possessions**

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Who Gets Grandma's Yellow Pie Plate

- Video
- Website: www.yellowpieplate.umn.edu

Families and Inheritance

Inheritance decisions can be a celebration of a person's life and provide meaningful continuity across the generations.



*What are the pie plates
in your family?*

Visit www.yellowpieplate.umn.edu for more information on *Who Gets Grandma's Yellow Pie Plate?*TM materials and trainings.

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