



Santa Barbara Museum of Natural History  
Presented by Development Office – Legacy Giving  
March 30, 2021 – Handout #1

## DO YOU NEED TO ADDRESS THIS ISSUE? ARE YOU READY?

Do you know if your family is prepared to pass on personal property as part of the inheritance process? Review these questions to help you think about the challenges you and your family may face. This may also be helpful as you deal with aging parents or parents-in-law or plan for personal belongings in your own estate.

Which of the following statements apply to you or your family?

- My family has not discussed what belongings have meaning for us and why.
- My family has discussed who will get what but there are no written plans. (Or I have thought about this but have not created any written plan.)
- My family member has a will but it does not include any specific instructions about personal property. Instead it says something like "Divide my personal possessions equally among my children."
- I need to learn what belongings are important to others and why.
- There are important keepsakes or family heirlooms; however, no one has written down their history or significance.
- My family member has a general plan for passing on belongings but I worry that no one will carry out his or her wishes.
- I expect disagreements about who should get what to arise.
- I've found it hard to start conversations with my family about inheritance and distribution or other family members find it hard to discuss.
- I'm not sure how to make fair decisions about belongings/personal property. I don't know how to think about fairness and equity.
- I need more information about various strategies for passing on belongings.
- A family member or I need to get affairs in order because of a serious illness or health condition.
- A family member or I need to prepare for a move to a different home (apartment, smaller home, assisted living facility, nursing home, etc.).



If you've said yes to any of these statements, you're definitely not alone.

It would be helpful to learn more about passing on personal possessions, speaking with your family members and your professional advisors and enacting more formal plans.

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