

October 20, 2014

Who Gets Grandma's Yellow Pie Plate?™

Is a program developed by the University of Minnesota Extension to help families with the distribution of possessions also known as non-titled property.

For more information about this program, visit:

<http://www.extension.umn.edu/family/personal-finance/who-gets-grandmas-yellow-pie-plate/>

To order the participant workbook from the University of Minnesota Extension, visit:

<http://www.extension.umn.edu/family/personal-finance/who-gets-grandmas-yellow-pie-plate/preview-and-order/workbook/>

Today's program is presented by the
Michigan State University Extension
Financial and Homeownership Education Team

For a variety of financial resources visit: mimoneyhealth.org

For online money management education visit: <http://www.ehomemoney.org/msue>

For online homebuyer education visit: <http://ehomeamerica.org/msue>

Complete an online Financial Health Survey:

http://www.mimoneyhealth.org/financial_health_survey

Personal Finance

Who Get Grandma's Pie Plate?™

Critical Conversations About Inheritance: Can We Talk?



Marlene S. Stum, Extension Specialist and Professor — Family Social Science

Reviewed February 2012 by the author.

Everyone seems to agree that family members need to talk about potential changes in health, inheritance, and estate planning issues before there is a crisis or someone is not able to communicate. But more often than not, spouses, aging parents/in-laws, siblings, and adult children too often fail to initiate these important conversations. Communicating and advance planning can reduce feelings of burden, guilt, and misunderstandings. It can also lessen the potential for conflict that family members often experience when they are put in the position of making decisions for others.

So Why Don't We Talk?

Denial of our own or other's mortality is often the reason conversations about inheritance can be so sensitive. Few family members want to give the impression that a family member might die or that they would want someone to die. Talking about human losses or changes in health can be emotional and filled with legal and financial complexities that many find overwhelming. In some cases, a family history of conflict among parents, in-laws, and siblings will influence if and how family members can communicate about later life transitions of aging parents.

Helping family members talk about issues that they normally do not want to address — or even acknowledge — is the focus of my research on inheritance issues. This research has been utilized to develop tools to help family members begin thoughtful communication about the complex inheritance issue of personal possessions.

Talking About Inheritance

Here are ten tips for talking about inheritance:

1. Be clear about your own motives for raising the issue. What are your concerns, what do you want to have happen, and why?

2. Respect the fact that others may not be ready or able to face their own or another's death. For example, making decisions about personal property immediately after a funeral may be too difficult given feelings of grief and loss.
3. Remember that listening is the part of communication we too often forget.
4. Ask "what if" questions. For example, "Dad, what would you want to have happen with the things in the house if you and Mom were no longer able to live here?"
5. Look for natural opportunities to talk. For example when a friend or relative is dealing with transferring personal possessions when someone moves or dies, use the situation to introduce a discussion. Ask, "What would you have done if you were in that situation?"
6. Recognize that family members will have different feelings and opinions. Conversations should focus on discovering where those involved agree and disagree. [The *Who Gets Grandma's Yellow Pie Plate?*[™] *Workbook* section, [Watch for Blaming](#) (246 K PDF), gives tips for minimizing blaming behavior.]
7. When another family member raises the issue, be willing to listen and talk. Adult children are just as likely to refuse to talk as parents or in-laws.
8. Not speaking up means that others will not know your opinions or feelings.
9. Use the *Who Gets Grandma's Yellow Pie Plate?*[™] *DVD* as a conversation starter. It helps everyone involved hear the same messages.
10. Share worksheets from the *Who Gets Grandma's Yellow Pie Plate?*[™] *Workbook* ([booklet](#) or [interactive CD](#)). Begin communicating with family members about what is most important to accomplish, what fair means, and identifying the items that have special meaning.

For more information, see the *Who Gets Grandma's Yellow Pie Plate?*[™] *Workbook* ([booklet](#) or [interactive CD](#)) or [Resources for Families](#). You may also be interested in more [Free Articles](#).

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Personal Finance

Who Gets Grandma's Yellow Pie Plate?™

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

Marlene S. Stum, Extension Specialist and Professor — Family Social Science

Reviewed February 2012 by the author.

Planning to pass on belongings that have special meaning, like grandma's yellow pie plate, can be challenging. The following tips will help you make decisions that are right for your family.

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. Plan ahead. 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. (The *Who Gets Grandma's Yellow Pie Plate?™ Workbook* resource, Worksheet 7: Use Your Belongings as Props for Telling Family Stories, can help you share your memories, history and rituals.)
4. Consider how to deal with conflicts before they arise. 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. (The *Who Gets Grandma's Yellow Pie Plate?™ Workbook* section, [Watch for Blaming](#) (246 K PDF), gives tips for minimizing blaming behavior.)
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. Consider all options. Being fair does not always mean being equal. In fact, dividing personal property equally is sometimes impossible.

7. Ask others for input. Individuals who have input and agree on how decisions are made are more likely to feel the outcomes of those decisions are fair.
8. Discuss what those involved want to accomplish. This will help reduce mistaken assumptions, misunderstood intentions, and makes choosing distribution options easier.
9. Ask others to identify items that have special meaning to them. This will help minimize inaccurate assumptions about who should get what. Not everyone will find the same items meaningful.
10. Put wishes in writing. By creating a separate listing mentioned in a will, for example, you will reduce the dilemmas and decisions for estate executors and surviving family members.

For more information, see the *Who Gets Grandma's Yellow Pie Plate?*™ *Workbook* (booklet or interactive CD) or *Resources for Families*. You may also be interested in more *Free Articles*.

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Decision Satellite Map

Instruction:

Think about one major financial decision you need to make soon.
Write your decision in the large center circle. Write the satellite decisions that you
will need to make in the surrounding circles. Add circles if you need to do so.

