



Determine What Fair Means

Marlene S. Stum, Family Social Science

Being Fair Is Often Important

Many people will say they want to be "fair" to all the members of their family when their belongings are transferred. What does "fair" mean? There can be many different ideas of what would make both the process and end result of who gets what personal belongings fair. What assumptions do members of your family have about what is fair when transferring non-titled personal property?

In some families it is considered fair when selected personal items are passed on to the oldest. In other families it is considered a fair process to allow only siblings to choose or receive items—no in-laws allowed. What unwritten rules or assumptions have been used to pass on non-titled personal property? Are there examples of times the process of transfer or who got what was considered unfair?

Does Fair Always Mean Equal?

No! Some family members consider the distribution of belongings to be fair when everyone has received an equal amount. In this case, differences among family members are not emphasized. When dealing with non-titled property challenges quickly arise about whether equal means an equal number of items, equal dollar value, or equal in terms of emotional value. What makes dividing equally even more difficult is that the sentimental meaning or value of items will differ for each individual. What one person considers of equal emotional value may not at all be what another would consider equal. Some personal belongings may or may not have a great deal of financial value. Who determines the value of an item and whether value is measured in emotional terms, dollars and cents, or some combination?

Some individuals prefer to take differences among family members into account with a desire to be "equitable" when transferring personal belongings. Things taken into account can include contributions over the years (care, gifts), needs (financial, emotional, physical), and other differences among family members such as age, birth order, or marital status.

A Fair Process Is Also Important

Some individuals may feel the process used to decide how transfers are done is more important than who actually gets what items. For example, family members may feel good about the end result if each person's viewpoint is heard and if the lottery system used to divide up important items is consistent for all involved. Different feelings about who should be involved and when transfers should occur can be the source of many disagreements. The issue of who is and isn't "family" can quickly arise. Is it fair if one daughter-in-law is involved and the sons-in-law are not? Is it fair that one son gets to receive items now, while other siblings have to wait?

Understand What "Fair" Means in Your Family

Different perceptions about what is "fair" are inevitable and normal. It can be extremely helpful to identify the "unwritten" rules or assumptions behind what is considered fair to members of your family. Worksheets A and B can help both owners and potential receivers of personal property clarify their assumptions about what "fair" means.

Using Worksheets:

- ☛ First, have each family member involved—either as an owner of non-titled property or as a potential receiver of non-titled property—answer the appropriate worksheet separately.
- ☛ Answers can then be compared to understand how beliefs are different or similar.
- ☛ Recognize that there are no right answers. Property owners have the legal right to decide when and how to transfer their non-titled property. However, understanding different perceptions about what is fair can help avoid making assumptions that are not necessarily true. It can be helpful for owners to let others know what rules they are using to decide who gets what and to communicate clearly what process is being used to decide. While others may see things differently, communicating can help reduce inaccurate assumptions, misunderstandings, and unnecessary tensions. Family members may also respectfully agree to disagree.
- ☛ Improving communication and agreeing to resolve conflicts if they arise can be helpful when talking about fairness. Suggestions are offered in "Managing Conflicts If They Arise," a part of this series.

Reference

Stum, M. S. "What research suggests about families and non-titled personal property inheritance," in *Who Gets Grandma's Yellow Pie Plate? Transferring Non-titled Property*, Minnesota Extension Service, University of Minnesota, St. Paul, 1996.

Produced by the Educational Development System, Minnesota Extension Service.

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Identify Special Objects to Transfer

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It's not just the objects themselves but the meanings and feelings that sustain one's life that are at issue. Family members need to be sensitive to and have respect for the feelings and meanings involved." (Csikszentmihalyi and Rochberg-Halton, 1981).

What special personal belongings or non-titled property are in your family? When different family members identify special items and explain their importance answers will vary. Have you thought about what special items you own and why? Do you know which of your belongings might be special to others and why?

Meanings Will Differ

While Grandma's yellow pie plate might be important to you, it may not be at all to others in your family. Make no assumptions about what someone else might value or why. The value given belongings by someone who is 83 years old may be different from that of someone who is 57 or 23 years old. Grandpa's journal may seem like just a dust collector to a grandchild who is currently 17, but may be considered a treasure full of family history when that grandchild is 47 years of age, or vice versa. A husband and wife may name the same special objects, but give different reasons why the item is special to them. When naming special objects, mothers and daughters tend to be more alike in their answers than fathers and sons.

Identify Special Items

An important step in making decisions about transferring non-titled property is to make a list of special objects. Then share the meaning attached to each item. Tell what makes it special and share your feelings about who should receive the item and why. Worksheet A can help owners ask and answer these important questions.

Gather Input from Others

Many parents choose to gather information from their children, grandchildren, or others before deciding what to pass on to others. Worksheet B can be used by children, grandchildren, other family members, or friends to help gather information from potential receivers of your non-titled property.

Don't be surprised to find many differences and perhaps many similarities in the lists. One mother was very surprised when three of her seven adult children listed a 25¢ Christmas tree ornament that had special memories for each of them. The mother still has the challenge of deciding which one of the three should receive the decoration. However, without asking the mother would never have known that the Christmas decoration was special to any of her children.

Potential List of Cherished Objects	
<ul style="list-style-type: none">• Furniture• Plates/dishes/utensils• Handmade items (quilts, stitchery, tables and chairs)• Antiques• Jewelry• Art pieces (pictures, vases)• Photographs	<ul style="list-style-type: none">• Written material (Bibles, book of poems written by Grandma, diaries, letters)• Electronic equipment (TV, CDs)• Musical instruments• Plants• Collections (coins, plates, guns, stamps)• Documents or records (marriage certificates, awards, military discharge papers)

Tell the Stories

Special family belongings serve as props to telling family stories. No matter what your ethnic origin, no matter how recent family members may have arrived in the United States, do not assume that objects used every day have more (or less) importance than belongings of previous generations.

Objects add meaning to celebrations and events. It is impossible to remember events without recalling the objects involved with those

**Tell the Stories
(cont.)**

events. Holiday dinner memories include the feel of the linen tablecloth, images of the china pattern and silverware, the butter dish with the missing cover, the wallpaper with smudges around the light-switch plate, and the glowing candles.

Sharing stories about special objects helps family members understand their past, discover another side of their family, and appreciate the real accomplishments of their ancestors. Without consciously asking about family history, a person may have a dim and distorted vision of the past. Sharing stories and meanings about significant belongings helps preserve family history, memories, and traditions. Sharing answers to the questions which follow can help tell the stories and preserve family legacies. Sharing can be done by talking, in writing, through cassettes or videotapes, or any combination of methods.

Use Your Belongings as Props for Telling Family Stories:

Name of item _____

When did you acquire it? _____

How did you acquire it? _____

When and how have you used it? _____

Who else owned it before you? _____

Who do you want to give it to when you no longer need it? _____

Why do you want this person to receive it? _____

What other memories do you have of this item? _____

What memories do you have of the people who owned this before you? _____

References


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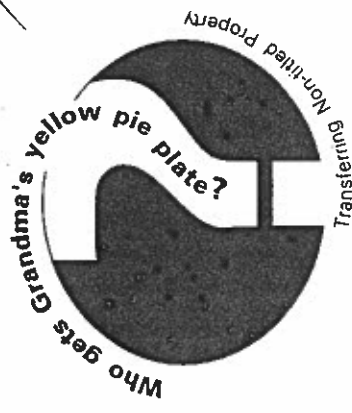
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Worksheet A

**For Owners/Givers of Non-Titled Property
Identify Special Objects to Transfer**

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What special belongings or non-titled property do you have which you hope to pass on or transfer to others?

Describe Item	Why Is This Item Special?	Who Should Receive It? Why?

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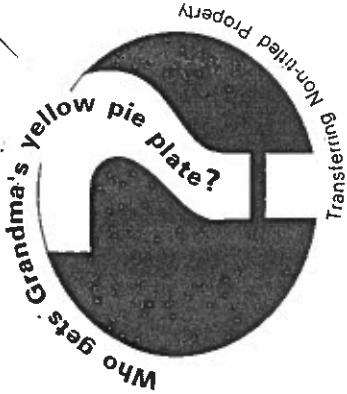
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Worksheet B

**For Children or Other Potential Receivers
Identify Special Objects to Transfer**

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What special personal belongings or non-titled property do your parents have which you hope they will pass on or transfer to you?

Describe Item	This Item Is Special To Me Because...	If Someone Else Received This Item I Would Feel...

Are there special objects/possessions your parent(s) have which you hope they will pass on or transfer to family members other than yourself?

Describe Item	This Item Should Go To... Because...

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