



Important personal possessions

Everybody has household items and mementos that have monetary or sentimental value. Perhaps you have jewelry, a handmade quilt that's been in the family forever, or an expensive computer or sound system. Make notes below about how you'd like to distribute such items among your heirs. Do this by walking through your home, room by room. Feel free to insert additional sheets of paper, if you have several items to list.

On the "Value" line in the listings below, estimate what the item is worth today—or what you paid for it—and when you purchased it. If you don't know the monetary value, that's OK; you can leave this line blank. However, if a possession is worth more money than an heir might realize, you will want to note the value.

One of the most difficult steps of passing on your possessions is deciding who gets what. Families handle this step in different ways. In some cases, the parents choose. In others, the children (or other loved ones) indicate what items they would like to receive. Regardless of which method may work best in your situation, you may want to place stickers on the items to be passed down, writing the name or initials of the recipient on each sticker. Listing these items and the corresponding recipients in this section of the record keeper can help confirm your wishes, in case of any future questions. Update this list, if necessary.

Above all, strive for preserving family harmony during this process of passing on your tangible legacy. Stress that you do not want your children to fight over objects or over who was designated to receive certain items. As one woman told her children, "I've done my best to be fair. If you are unhappy, be unhappy with me, not with each other."

* Note: This is not a legal document. Listing an heir below does not guarantee that the item will pass to that heir. To make sure your wishes are carried out, this information must be added to or referenced in your will or trust by an attorney. You also may want to store this list in a safe place in case you ever need it for a property-insurance claim.

Living room

Item: _____ Item: _____

Value: _____ Value: _____

Heir: _____ Heir: _____

Item: _____ Item: _____

Value: _____ Value: _____

Heir: _____ Heir: _____