

## **Showcase USA: Who Gets Grandma's Yellow Pie Plate?™ Transferring non-titled personal property**

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### **Abstract**

The issue of intergenerational transfer of personal property faces families of all socioeconomic levels, cultures, and geographic areas. Professional collaborators to this project informed development team members that few educational materials exist to help family members make informed decisions about transferring non-titled property. The educational materials, "Who Gets Grandma's Yellow Pie Plate?"™ were developed to fill that void.

"Who Gets Grandma's Yellow Pie Plate?™: Transferring Non-Titled Personal Property" addresses an issue that affects almost everyone. Every family member must divide and distribute family treasures when parents and other family members move, remarry, or die. Personal property includes personal belongings such as family photographs, a baseball glove, an oak table, or a yellow pie plate that hold meaning for the individual and possibly for other family members. What happens to someone's belongings when he or she dies? Who decides who gets what? How can decisions be made during the individual's lifetime?

Decisions about both titled and non-titled property are important. Planning for the transfer of non-titled personal possessions is a challenge facing not only owners of items, but also family members and legal representatives who may be left to make decisions when a family member dies. Personal property transfer is an issue frequently ignored until a crisis occurs and often is assumed to be unimportant or an issue that just takes care of itself.

Most family estate planning educational programs deal with titled property, such as cars, house, land, cabins, certificates of deposit, and other financial instruments, including stocks and bonds. Seven University of Minnesota Extension educators developed the "Who Gets Grandma's Yellow Pie Plate?"™ educational program after consulting with attorneys who stated that disposition of titled property is usually quite amiable and easily accomplished. There is always the possibility of the disinherited son or daughter who fights the will, but generally the money

and other titled property divide up easily. However, the attorneys consulting with this educational program development team said time and again that it is the "stuff" that created family problems -- one can easily divide \$100,000 into five parts but what do you do with an eight-piece set of dishes and silver flatware?

This dilemma led team members to look further into the issue of dividing non-titled assets. They discovered little educational work had been done in this area and few published materials were available to assist families in their decision making. The limited research literature contributed to the project development team's understanding about the meaning of objects related to non-titled personal property.

Team members began doing research with 64 families, and received input from other states and experts (attorneys and family social scientists) regarding questions to ask. Team members then developed some educational materials to pilot. The result is the family-focused educational package, "Who Gets Grandma's Yellow Pie Plate?™: Transferring Non-Titled Personal Property," which offers considerations for transfer of personal property.

The research and consultations with collaborators from legal and aging communities, and family social science identified six key issues that impact distribution of non-titled assets. Distribution is more problematic if any one issue is ignored. Many learners may respond to the criteria thinking, "I knew that," or "how ordinary -- it's only common sense." But because of stress often associated with distribution of family personal possessions at times of downsizing or death, these factors are often overlooked or rushed through, or dealt with after everything else is done. The factors include:

- Understanding the sensitivity of the issue
- Determining what you want to accomplish
- Determining what is fair
- Identifying the meaning of objects
- Recognizing distribution options and consequences
- Agreeing to manage conflict

Educational programs were conducted in Minnesota before the team introduced the program to national audiences beginning in 1996. Currently this program is conducted throughout Minnesota and in almost all 50 states. To date, more than 100,000 families have participated. In one

evaluation sample, 76 percent of participating families reported having used this educational information for family property decisions. Twenty-six families reported incorporating this educational program into their formal estate plans in another follow-up study by a Minnesota Extension Educator who taught the program.

"Who Gets Grandma's Yellow Pie Plate?"™ has been featured in *Wall Street Journal Encore*; *Successful Farming*; Sunday newspapers in Cleveland, OH; Fargo, ND; Minneapolis and St. Paul, MN; a Minnesota medical journal; *AAFCS Journal*, and *U.S. News and World Report*. Project team members have presented the program at 3M, Gateway Computers, Federal Cartridge, AAUW chapters, AARP Biennial Convention, and national and international educational conferences. Research articles have also been published (Stum, M.S. 1999. "I just want to be fair": interpersonal justice in intergenerational transfers of non-titled property. *Family Relations*, 48(2): 159-166).

Stories have been shared by program participants. One participant said, "We're in the process of closing another house (the fifth one I've been involved with). I wish I had known all this before doing the first four!" Another stated, "As executor for my mother's estate, I never expected my sisters to act the way they did! This information helped us sort out what we wanted, talk about what we thought was fair, and consider different options. It wasn't easy, but we are still talking."

Educational materials include a 13-minute video (\$30), a 95-page workbook newly revised in 1999 with worksheets and tools that help address six critical decision making factors (\$12.50), and an educator's package including research findings, video, workbook with worksheets, disk with PowerPoint overheads, and training outline (\$125). Activities suitable for classroom settings or small group sessions are included in the educator's package.

To order contact University of Minnesota Extension Service Distribution Center, toll-free phone 1-800-876-8636, fax: 1-612-625-6281, [rder@dc.extension.umn.edu](mailto:rder@dc.extension.umn.edu).

For training or information, contact Marlene Stum, Associate Professor, University of Minnesota, 290 McNeal Hall, St. Paul, MN 55108, phone 1-612-625-4270, [mstum@che2.che.umn.edu](mailto:mstum@che2.che.umn.edu).

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