Who Gets Grandma’s Yellow Pie Plate?
Six key factors in transferring non-titled property

Understand the Sensitivity of Transferring Personal Property
- Facing Loss and Transition
- Differing Perceptions
- Avoiding the Issue

Determine What You Want to Accomplish--Goals
- Maintaining Privacy
- Improving Family Relationships
- Being Fair to All Involved
- Preserving Memories
- Contributing to Society

Decide What “Fair” Means in Your Family
- Treating Everyone Equally
- Recognizing Different Contributions
- Recognizing Different Needs
- Recognizing Differences among Family Members

Identify Special Objects to Transfer
- Identify Special Items and Share the Meaning
- Ask for Input from Others

Consider Distribution Options and Consequences
- Options- wills, lists, gifts, verbal or “someday” promises, labeling items, private auction,
  public auction, silent auction, garage/yard sale, estate sale, pilfer items, family
  distribution
- Establish Ground Rules

Manage Conflicts if They Occur
- Listen
- Use “I” messages


IOWA STATE UNIVERSITY
University Extension
<table>
<thead>
<tr>
<th>Who Should Receive It?</th>
<th>Why Is This Item Special?</th>
<th>Describe Item</th>
</tr>
</thead>
</table>

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

Marlene S. Sturm, Family Social Science

Identity Special Objects to Transfer

For Owners/Claimers of Non-Titled Property

Worksheet A

University of Minnesota
Minnesota Extension Service
<p>| Who Should Receive It? Why? | Why is This Item Special? | Describe Item |</p>
<table>
<thead>
<tr>
<th>This Item I Would Feel...</th>
<th>To Me Because...</th>
<th>This Item Is Special</th>
<th>Describe Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>If Someone Else Received</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Transfer to your

What special personal belongings or non-tilled property do your parents have which you hope they will pass on or

Marlene S. Stum, Family Social Science

Identity Special Objects to Transfer

For Children or Other Potential Receivers

Worksheet B

UNIVERSITY OF MINNESOTA

MINNESOTA EXTENSION SERVICE
<table>
<thead>
<tr>
<th>This Item Should Go To … Because …</th>
<th>Describe Item</th>
</tr>
</thead>
</table>

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

Decisions about the transfer of tangible personal property may be addressed in a

"...written statement, letter or list...not otherwise specifically disposed of
by the will...this provision does not apply to "Tangible personal property
used in a trade or business."

Tangible personal property includes "household goods, furnishings,
furniture, personal effects, clothing, jewelry, books, works of art,
ornaments, and automobiles."

Iowa Code 6333.276

A list for distribution of personal property, should meet the following requirements to be
legally binding:
• Referred to in the will
• Prepared in the handwriting of the testator (the person making the will) or signed by
the testator.
• Dated
• Describe the items to be distributed with reasonable certainty.
• Describe the individuals who will receive the property with reasonable certainty.

The list should be kept up-to-date to avoid unnecessary expense and wasted time when
the will is being executed. Item(s) lost, sold, broken or given away should be crossed off
or removed from the list. Each change should be initialed by the testator or signed and
dated. You can make a new list any time circumstances change.

Distribution of Personal Property According to Iowa Code Section 633.276

To: My Family, Heirs, Executor or Personal Representative

This is the list that I referred to in my Last Will and Testament. Therefore, please
distribute the items listed below to the persons I have named:

<table>
<thead>
<tr>
<th>ITEM</th>
<th>TO BE DISTRIBUTED TO:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grandfather's clock (from living room)</td>
<td>My sister, Susan Jones Brown</td>
</tr>
<tr>
<td>Grandfather's woodworking tools</td>
<td>My brother, John James Olson</td>
</tr>
<tr>
<td>My collection of flower vases</td>
<td>My sister Susan's son, Troy Brown</td>
</tr>
</tbody>
</table>

NOTE: Keep a copy of your most recent list with your will, a family member, or the
executor of your estate.