

# Genealogical Estate Planning

Deciding where our genealogical materials should go when we die becomes more and more important to genealogists as our collection grows. Just as we need an overall estate plan, we need a genealogical estate plan to ensure that our work and heirlooms survive us. Here is a step-by-step approach for such a plan.

## 1. Three-step GENEALOGICAL ESTATE PLAN

A. Make a **BRAINSTORMING WORKSHEET** of four lists. (*Write this by column.*)

- \* List 1: **FAMILIES**: list the four family groups represented by you and your spouse's grandparents, e.g. Wendleton/Hendrick, Wolfe/Schupp, Jones/Fonville, Tebbutt/Slater.
- \* List 2: **FORMATS**: list the types of formats you have, e.g. computer files, binders, file folders, published family histories, photo albums, loose photos, loose papers, reference books, etc.
- \* List 3: **LOCATIONS**: list the places where your stuff is stored, e.g. computer, filing cabinet, office bookshelf, den bookshelf, garage, hall closet, etc.
- \* List 4: **POSSIBLE BENEFICIARIES**: list all relatives and public repositories that you have considered as designees.

B. Make **FOUR INDEXES** with four columns each, one for each set of grandparents listed on the brainstorming worksheet, titled with family names + allied families. (*Read these tables by rows. If uncertain about designees or instructions, leave blank until choice is made.*)

- \* Column 1: **FORMATS/DESCRIPTION** (identification of items)
- \* Column 2: **LOCATION** (of each item)
- \* Column 3: **DESIGNEE** (for each item)
- \* Column 4: **INSTRUCTIONS** (for each item, as needed)

C. Write a **GENEALOGICAL WILL** in letter format, with the four indexes attached.

- \* Identify a "genealogical executor" from your family who has agreed to carry out instructions.
- \* Thank family for their help and support.
- \* Give overview of purpose and desires.
- \* List subscriptions to online services or publications, noting autopay accounts.
- \* *Important*: note names and passwords of accounts, e.g. Ancestry.com, ftdna.com.
- \* Explain the different formats in which data is kept, including heirlooms.
- \* Refer to the four index pages for designees and specific instructions.
- \* Don't worry about writing the perfect will; anything is better than nothing.
- \* As circumstances change, edit your indexes and genealogical will.
- \* Don't leave decisions for others to make when you should make them yourself.

## 2. Choosing beneficiaries

A. Relatives (We should start asking now, although things may change later.)

- \* Talk with children or grandchildren; find out what matters to them.
- \* Talk with nieces or nephews, cousins' children, especially those in home county.
- \* Nurture some historians by history adventures, reunions, and sharing history tidbits.
- \* Think of genealogical materials by **FAMILY** rather than by type: Jones photos, Wolfe photos
- \* Consider dividing your collection so people receive only their own family's materials.

B. Public repositories

- \* Think: where would someone go who was looking for my ancestors?
- \* Consider county and state libraries, historical societies, and museums in or near the "home county".
- \* Consider nationally known libraries and archives, e.g. Family History Library.
- \* Learn what their rules are for accepting genealogical materials.

## 3. Benefits of writing a genealogical estate plan

A. We will sleep better; our family will appreciate knowing there's a plan.

B. We will see what can and should be done now.