



# Transferring Cherished Possessions

## LESSON 3: WHO GETS WHAT?

### WOODWORK AND WEDDING RINGS VIGNETTE

Jane (80) and Tom (85) have been married for 52 years and have three grown children together: Jake (50), Abigail (48), and Anna (45). Tom also has a son from his first marriage (Toby, 55). All four children grew up in the same household with Jane and Tom and still meet for holidays as a family. When Tom unexpectedly passes away from a heart attack, Jane inherits Tom's possessions as the surviving spouse. When going through Tom's things, Jane finds two unique items: Tom's wedding rings from his first marriage to Toby's mother (deceased), as well as an antique bedframe in his workshop that Tom recently restored.

#### ADDITIONAL INFORMATION:

- Jake and Toby both worked with their father to restore the bedframe. It is a hobby they shared with their dad, and this had been their most recent project.
- Abigail visits her parents frequently to make sure they are doing well and are stocked up on groceries. She was especially close with her father and admired his woodwork.
- Anna is a single mom with financial difficulties. She recently moved into a new home and needs a bedframe.
- All four children would like to have the bedframe.

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#### ACTIVITY:

Imagine you are Jane, and you want to begin distributing these assets. On the back of this handout, fill out an *Asset Distribution Plan* beginning with the rings and bedframe.

Note how you came to the conclusions you did about each item.

What could this family have done differently to improve clarity before Tom passed away?

## SAMPLE ASSET DISTRIBUTION PLAN:

Room/Area of the Home: \_\_\_\_\_

Possession	Recipient(s)	Reason	Distribution Method
Wedding Rings			
Bedframe			

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