



EDWARDS GROUP LLC

C O U N S E L O R S A T L A W

Your Life • Your Family • Your Legacy

“Special Stuff” List and Planning Worksheet: Avoid Family Battles and Share Your Story

Many families fight over heirlooms or special possessions. By being specific about who gets what, you can avoid fights, misunderstandings, and also pass along the priceless stories behind the items. This worksheet will help you gather your thoughts. Then, to make your wishes official, create a “special stuff list” which is officially called a *Memorandum for Distribution of Tangible Property*, that will work alongside your Will or Living Trust.

Instructions

1. Complete this worksheet category by category, carefully including anything you might want to pass down.
2. Be sure to describe each item in detail, or attach pictures of the items.
3. Take a few moments to write a few sentences about each object. Consider why the object is important to you, any history the object may hold, and/or why you want a specific person to have it.
4. Use this list as a basis to finalize your wishes in what we call your “Special Stuff List,” officially called a *Memorandum for Distribution of Tangible Property*.

China, crystal, silver or silverware. Is there any china, crystal or silver/silverware that you would like to pass down? Do any of the items have special stories or hold special significance to you or the person you're leaving it to?

Item Description	Beneficiary	Story attached?

Photographs or art What photographs or art would you like to pass down? Where did you acquire the art? Do any of the items have special stories or hold special significance to you or the person you're leaving it to?

Item Description	Beneficiary	Story attached?

Antiques or books. Do you own any antiques or special books that you would like to pass down? Did they come from someplace special? Do any of the items have stories or hold special significance to you or the person you're leaving it to? If so, attach a separate paragraph explaining.

Item Description	Beneficiary	Story attached?

Sporting goods. Do you have golf clubs, kayaks, fishing equipment, etc. that you would like to pass down? Do any of the items have special stories or hold special significance to you or the person you're leaving it to?

Item Description	Beneficiary	Story attached?

Artifacts relating to hobbies. What articles or items relating to your hobbies would you like to pass down? Do any of the items have special stories or hold special significance to you or the person you're leaving it to?

Item Description	Beneficiary	Story attached?

Previously inherited items, special collections or miscellaneous. Do you have something from your grandmother that you inherited that you'd like to pass down? Do you have special collections of coins, stamps or ceramics that you would like to pass down? Do they have stories or instructions that need to be passed down with the item? If so, be sure to record and attach.

Item Description	Beneficiary	Story attached?