

# Genealogical Estate Planning

The challenge of deciding where our genealogical materials should go when we die is much on the minds of today's genealogists. The topic needs a specific name, one that can be Googled. I propose the term "genealogical estate planning". Here is a step-by-step approach for developing such a plan.

## 1. Consider who should have our genealogical materials

### A. Relatives (we MUST 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.

## 2. Three-step GENEALOGICAL ESTATE PLAN

### A. Make a rough **WORKSHEET** of four lists. (*Use a table in Word or an Excel spreadsheet.*)

- \* List 1: FAMILIES: list the four family groups represented by your 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. binders, file folders, computer files, published family histories, photo albums, loose photos, reference books, etc.
- \* List 3: LOCATIONS: list the places where your stuff is stored, e.g. filing cabinet, office bookshelf, den bookshelf, hall closet, etc.
- \* List 4: POSSIBLE BENEFICIARIES: list all relatives and public repositories that you have considered as designees.

B. Make at least **FOUR INDEXES** with four columns, one for each set of grandparents listed on the 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.

## 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.