

## Table of Contents

page no.

xiii FOREWORD BY GRIFFIN B. BELL

xv INTRODUCTION AND OVERVIEW

xvii DISCLAIMER

xix ACKNOWLEDGMENTS

1 **1** How to Use This Book

- *You Will Still Need a Family Attorney*
- *Who Should Read This Book*
- *How Your Heirs Will Settle Your Estate*
- *How an Estate Plan Differs from a Will*
- *Personality Differences*
- *Other Suggestions*

25 **2** Common Sense Is No Gamble

29 **3** The Ground Rules

- *Determine the Players*
- *Commit to a Common Goal to Achieve a Peaceful and Fair Settlement*
- *Agree Not to Remove Anything from the Home or Premises*
- *Establish a System of Organization*

- 37 **4** The Game Setup
- *Appraisal*
  - *Interest Lists*
  - *Distribution Sheets*
  - *Other Items of Organization*
- 47 **5** Preparing the Field of Play
- *A Few Other Valuable Suggestions*
- 55 **6** Playing the Game
- *Grouping*
  - *Rolling the Dice*
  - *Regrouping*
  - *Color-Coded Tags*
  - *Where to Put Selections*
  - *A Word about Old Toys*
  - *What to Do with What Is Left*
  - *Caution: Do Not Finalize Yet*
  - *“This Old House”—Make Repairs on Real Estate to Be Sold*
- 65 **7** Keeping Score
- *Recording the Value*
  - *The Tally and Property Equalization*
- 69 **8** Optional Enhancements to the Game
- *Have One Last Party at the Home*
  - *Make a Video of the House and Grounds*
  - *Make a Final Photo of the House*

73 9 Overtime Play

79 10 Final Stats: The “To-Do” List

- *Death Certificate Copies*
- *Banking*
- *Household Accounts*
- *Forwarding Address*
- *Life Insurance Policies*
- *Income Taxes*
- *Investment Accounts, Stocks, and Bonds*
- *Real Estate*
- *Social Security Death Benefit*

85 11 When the Game Is Over:  
The Final Score

89 Appendix:  
Forms for Use in the Settlement

- *Appraisal List*
- *Interest Lists*
- *Distribution Sheets*
- *Tally Sheets*
- *Household Accounts and Bills Record*

111 SUMMARY OF COURT CASE: MCDANIEL V. BARRESI

115 GRIFFIN BELL BIOGRAPHY

117 ABOUT THE AUTHOR