

Book explores how stuff we own now can make a meaningful difference later

LIKE MOST good ideas, this one — to write a book about what to do with everything you own to leave the legacy you want — wasn't mine.

The idea belonged to a publisher I worked with years ago who tracked me down to write it up.

"Why me?" I asked, when he shared his vision for a book on estate planning, but different. The world of wills and trusts was as foreign to me as nuclear physics. "I'm a home design columnist. My books are about downsizing."

"Because this is the ultimate downsizing project," he said. "I've been looking for a book that goes beyond just getting your papers in order, for one that talks about what to do with everything else, and it's not out there."

"So, you want an estate planning book that goes beyond people's portfolios to their possessions, beyond their bank accounts to their belongings. A book that deals with the dishes and clothes, books and tools, mementos and music, art and jewelry. Our collections and cars. Our furniture, recipes, photos and linens. Everything we've made and touched and loved?" So simple.

"Yes, and that tells us how to create a plan while we're alive so that our material assets can benefit others when we're not around anymore."

"When we're not around anymore?!" I needed a stiff drink of something to figure out whether I was up to this.

"Also," he added, his voice dropping, "I personally could really use this book, so could you hurry?"

This all happened in the fall before COVID-19, and this fellow



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was and is fit and in his fifties, so I really didn't know what the rush was, though, now, I think we all take life a little less for granted.

"Think about it," he said.

So I started thinking, which sounds a lot like a lawn mower running over pea gravel. I thought about how, while we're alive, our belongings bring us security, visual pleasure, comfort and convenience. They inspire feelings of accomplishment, memories and connections. They to some degree define us.

And then what? What if we could ensure that once we cross the finish line, our money and material goods would get funneled and redistributed in a way that served the people and causes we loved and made a meaningful difference, as opposed to just creating a mess?

I know, I know, we are out on a very thin limb here, but what if small moves we made today had a lasting impact for generations to come?

I dug in. I talked to experts in tax and estate law, financial planning, philanthropy, estate sales, auctions, art and furniture appraisals. Then I talked to the real

experts — people of all ages and stages who had created an exit plan with intention.

Among them were some with no children, many children or someone else's children, from families that were blended, up-ended or extended. Some had a

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