UF UNIVERSITY of FLORIDA IFAS Extension

Worksheet: Starting the Planning Process

Directions: Create a list brief list to help identify your transfer wishes.

Item	To Be Distributed To *(Family/friends/conservation/sell)*	Transfer Method (Will, gift, sell)	Discussion necessary? With who? For what reason?	Next step to be taken
Baseball Glove	*My son, Bill*	*Gift*	*Bill is the only one of my children that loves baseball, but maybe I should discuss this with all of the children to avoid arguments.*	*Amend will or have last letter of instruction*