

Gen-Legacy Planning

17 Sep 2013

Leaving a Family History Legacy -

"Material needs to be filed and arranged in an orderly fashion so that the heirs do not get hysterical, fed up, or worse, and just give up and TOSS!" - Jane Lindsey

1. Your Will / Trust

2. Directives

a. NAME A GEN-EXECUTOR

b. A descendant is good but a (more widely placed) family member is fine. It should be someone with a reverence for history and an appreciation for family stories.

This person is not expected to FINISH your work, but rather to ensure the documents live for future generations to know about.

c. \$\$ Set aside \$\$ to sort, organize and distribute your research

i. Binding only if it is in your Will or Trust. Letter in your Drop Dead File will only be a wish but should be made known to your heirs.

ii. \$\$ may be for the Gen-Executor to organize,

(a) or, to hire a professional genealogist

(b) or, a donation to a genealogy society or library to provide the organization and distribution (some societies require \$\$ for organizing materials, shipping, appraisals, etc.)

d. Contact genealogical or historical societies or libraries AHEAD of time to find out what they accept of donated papers and if they might be interested in your collection of either researched families or original documents or photos.

i. Make a list of societies that are important to your family history and what items might be directed their way.

ii. There may be tax deductions in these gifts and finding a home in a temperature controlled library might be better than the garage of a child who is not interested or not situated to care for Grandma's letters or Dad's military certificate.

3. DROP DEAD BOOK - remember, your kids don't have a clue what you have or whether or not it is valuable

a. Digital Files

i. Family Genealogy Data Base

(a) When you do your backups, send a copy (CD, DVD, whatever is current technology) to a relative out of town. The more widely your research is distributed, the more likely it is to survive down generations. 3-2-1¹

(b) Print a set of surname Family Group Sheets and send to a genealogy or history society or library in the area where your ancestors lived.

(c) Migrate digital files to new media in a timely manner. Include childhood videos, audio (interview) files, scanned photos, etc.

¹ 3-2-1 THREE copies of each photo on TWO different media with ONE copy offsite.

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b. Papers/Binders/Files

- i. Describe your research file organization and place a copy of that description into your Drop Dead File. Ensure there is a copy of your directive in each and every binder.
- ii. Loose Papers
 - (a) PROCESS and ORGANIZE. Libraries and societies are not interested in playing CSI with research someone else did. If it is not organized into a “collection” it will not be accepted.
 - (b) ALL OTHER PAPERS WILL BE TOSSED.

iii. ORIGINAL DOCUMENTS

- (a) Put them in sleeves or other protective/archival casings.
- (b) **Label the binder** (or other container) very boldly to ensure it does not accidentally get tossed. Ensure that contents are clearly labeled as to who they pertain to, how you came to have them, and who is to receive them.

c. PHOTOS

- i. **Label all photos** so that your grandchildren will be able to identify your Mother. You are the last generation that will know who some of the people in the photos are. Use a soft lead pencil or a photo-safe pen.
- ii. **Scan all photos** in order to share with other family members and ensure that the images will survive through the generations. Use the rule of 3-2-1². Copy to current media format often.
- iii. Remove from old magnetic albums, put into sleeves or use corners to mount on acid-free, lignin-free paper.
- iv. See The Practical Archivist, <http://practicalarchivist.com/> for more info on how to care for photos. Get the free brochure, *8 Blunders People Make When They Scan Photos and How To Avoid Them*

d. Books

- i. Flag every book as a family “keeper” (has your surname or origin on the spine), donation to a specific library, or available for best offer. Create “notes” to place inside every book (no gummy or stick substances), just loose. Ensure it sticks up above the top so that it will not be missed as it comes off of the shelf.
- ii. Create a spreadsheet of your books and recommended disposition. Place a copy in your Drop Dead File. Update at least once a year.

e. Memorabilia and other stuff

- i. Photograph all of your family “heirlooms” (ha!)
- ii. Create a file with your word-processor. Drag in photos of each item. Write the **very brief story of the piece, its lineage as best you know it, and who is to receive it.** Write the story even if you do not have a preference for who it is to go to. Sign and date the printout. Place this letter into your Drop Dead File.

“The shortest pencil is better than the longest memory.” - Chinese Proverb

² 3-2-1 *ibid.*