

PLANNING A FUTURE FOR YOUR FAMILY'S PAST

By Marian Wood

Ancestors' photos, stories, documents, and heirlooms deserve to survive for many years to come. As part of your family's past, they belong to your family's future. This presentation will demonstrate how to organize, inventory, index, and analyze your genealogy materials; find good homes for duplicate or unneeded photos, collectibles, and memorabilia; and pass what you know to the next generation.

The PASS process:

1. ***Prepare*** by organizing materials (photos/slides/movies, documents, letters/diaries, etc.)
2. ***Allocate*** ownership (who gets what—inside and outside the family)
3. ***Set up*** a genealogical will (written instructions for what happens to your materials)
4. ***Share*** with heirs (generate enthusiasm for your family's past)

Step 1: ***Prepare*** by organizing your materials, little by little

- Separate items (by family or surname, type of material, generation, etc.)
- Inventory, index, analyze your collection (by family or surname, relationship, etc.)
- Organize, store, and protect physical and digital items (including e-mail messages)
 - ⇒ Physical storage (file folders, binders, archival boxes, archival sleeves, etc.)
 - ⇒ Digitize materials (for long-term preservation)
 - ⇒ Digital storage (sort by surname, family, type of document, etc., and always back up)
- Update or outline family tree(s), family group sheets, pedigrees as a convenient summary

Step 2: ***Allocate*** ownership

- Decide what to keep and what to give away (yearbooks, art objects, historical objects, etc.)
- Offer duplicates, heirlooms, and memorabilia to family members

- Donate items to historical societies, museums, libraries, or other institutions (ask first)
- If needed, get professional advice about tax consequences of donations

Step 3: **Set up** a genealogical will

- Identify heirs to take possession of the collection in the next generation
- Describe the collection (physical, digital) and the location (family tree passwords, etc.)
- Ask permission to bequeath, and leave some money to help your genealogical heirs
- Include information about living relatives (cousin connections)
- Review sample genealogical wills (two ideas below) or write your own
 - ⇒ www.devonfhs.org.uk/my-genealogical-will.pdf
 - ⇒ www.rootsweb.ancestry.com/~alwalker/Codicil.htm

Step 4: **Share** your knowledge

- Start now to get the next generation excited about ancestors and family stories
- Recreate wedding albums or other one-of-a-kind items for multiple heirs
- Emphasize unique aspects of the family's history (pioneers, heroes, villains, etc.)
- Tell the stories often and in a vivid way (dramatic aspects, humorous aspects, etc.)
- Create keepsake family trees or pedigrees (one idea below)
 - ⇒ <https://familysearch.org/campaign/keepsakes>

Please visit my genealogy blog:

<http://climbingmyfamilytree.blogspot.com/>