

Memorandum for Distribution of Tangible Personal Property

(According to WI Statutes 835.32)

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TO: My Personal Representative or person named in Will to distribute property.

This is the list (memorandum) referred to in my Will. Please distribute the items listed below to the persons or organizations I have named:

Item (Describe)	To Be Distributed To
_____	Name _____
_____	Address _____
_____	Name _____
_____	Address _____
_____	Name _____
_____	Address _____
_____	Name _____
_____	Address _____
_____	Name _____
_____	Address _____

Unless otherwise indicated, if the person or organization named to receive a particular item does not survive me or does not exist at the time of my death, such bequest shall lapse and the item shall pass in accordance with the other provisions of my Will. Items will pass to the above named persons or organizations only to the extent such items are owned by me at my death, and will not be substituted for or replaced. Additional bequests may be made by me on another copy of this form.

(Date)

(Signature)

(Witness)

Distribution of Tangible Personal Property (factsheet)

The attached factsheet is suggested for use with your estate planning teaching and with the Minnesota materials on "Transferring Non-Titled Property" (Who Will Get Grandma's Yellow Pie Plate). It offers several suggested ways of disposing of tangible personal property.

The factsheet explains the new memorandum law in Wisconsin and has a sample one-page "form" that can be used for listing property to be distributed at death. (There can be many sheets of this kind, but each needs to be dated and signed.)

Intestate Succession Diagram

Attached to the factsheet is a one-page diagram of Wisconsin's Intestate Succession rule. More information on this topic is available in our publication B1442: Family Estate Planning in Wisconsin. For those of you who have the Minnesota notebook on "Transferring Non-Titled Property" this diagram should be inserted to replace the Minnesota one.

Both of these items fit into the Distribution Options and Rules section of the Minnesota notebook.

You may want to share these materials with other educators in your office.

If you have questions, please do not hesitate to call me.

Karen P. Goebel

