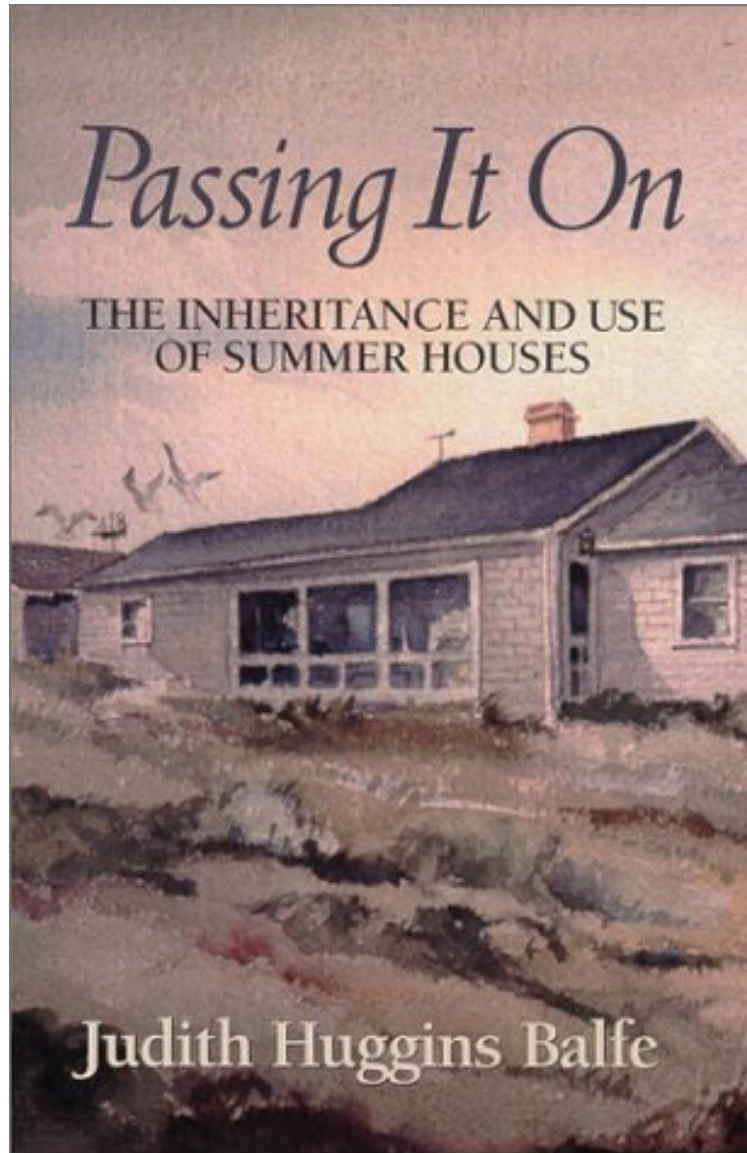


(Free pdf) Passing It On : The Inheritance and Use of Summer Houses

Passing It On : The Inheritance and Use of Summer Houses

Judith Huggins Balfe

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Judith Huggins Balfe : Passing It On : The Inheritance and Use of Summer Houses before purchasing it in order to gauge whether or not it would be worth my time, and all praised Passing It On : The Inheritance and Use of Summer Houses:

0 of 0 people found the following review helpful. Lake House + 4 children = potential inheritance problems By L.

HighfieldGave this as a birthday gift to hubby. He had a beautiful dream house built for us on a lake, but now we hope we can leave it to our 4 kids, which has it's problems right there. Hoping this book can help steer us in the right direction to make our wishes clear. It gives great examples of problems encountered and the solutions to them. Should be quite helpful.29 of 30 people found the following review helpful. What about the cottage? Survival Lessons in Family LifeBy Jan MarontateRemember the old adage "the family that plays together, stays together"? Summer houses may keep some families together but not mine. The arrival of spring and the end of summer heralded two major operations-- opening and closing my in-laws' summer cottage. For me their summer cottage became a place of enforced drudgery where I tried to gain acceptance as a dutiful daughter-in-law-until I stopped going altogether. Sound familiar? If your relationship with relatives is heading in this direction get copies of Judith Balfe's books about ways families SUCCEED at sharing and passing on summer houses before it is too late. Even after it is too late Balfe's book still provides insights into how families work through problems of sharing and ACTUALLY HAVE FUN TOGETHER.Judith Balfe, a sociologist of culture, has produced a compelling reflection on the meanings summer houses have in the lives of owners, their heirs and other users. Passing It On: The Inheritance and Use of Summer Houses focuses on how families reach agreements about what is fair and fun.Deep feelings often rise to the surface when family members must grapple with questions about how to share the benefits and the burdens. By thinking through these issues families can begin to develop their own solutions building on the experiences of people who have actually worked things out.A second and much shorter companion volume, co-authored with her brother, Ken Huggins a professor of education, is intended as a short practical manual for developing agreements in changing circumstances-How to Pass It On: The Ownership and Use of Summer Houses. This second book is designed as tool to help families talk about difficult issues and sort out trivial conflicts that could otherwise tear them apart--covering a wide range of issues from rules about sharing toilet paper and allowing pets to dealing with personality conflicts, divorce, taxation and ownership).Balfe and Huggins draw on their experience as brother and sister who worked through problems when they and their siblings had to deal with inheriting the summer residence from their parents.In the main book (Passing it on) Balfe presents research from published sources and reports on a study of 125 respondents with summer houses in the U.S. and Canada. The respondents include "founders" (or the first generation of owners), heirs and other users of summer homes ranging from tiny cottages built on leased land to a privately-owned island off the New England coast assessed at US\$8 million.Some readers may prefer to skim the first three chapters about inheritance practices and theories of the function of summer homes and jump ahead to Chapter 4 when the voices of interviewees become stronger and practical advice abounds. But these are useful tools for thinking about the issues. Some accounts are hilarious depictions of the tensions of cottage life and others heartbreaking to read.In this era of geographic mobility and family breakdown summer houses mean different things to different people- places to play, to express creativity, to work on projects or relax. They may sometimes provide a refuge for solitary retreats or romantic trysts, but in the warm weather months the summer house tends to fill up with relatives, in-laws and friends. These intense bouts of close contact make or break relationships. As people follow jobs to remote corners of the world and family elders retire in smaller abodes the summer home may become the only place where families can physically meet. In the words of one summer house user "This is where we are and do family"(p. 91).Even within the same family inequities exist. Siblings frequently have different incomes and different levels of flexibility about vacation times; some live further away; some have many children; others none at all; some love pets others cannot abide them. Balfe presents a very useful analysis of various ways owners and prospective heirs plan for passing on the summer home and adapt to changing needs and tastes of family members. When is shared inheritance feasible? Do step-children have the same rights as blood relatives? Who gets to use the cottage during the best summer months? May brother's ex-wife who mother always preferred to her own daughters still have the place for a week each summer? And whose time is reduced as a consequence? Who pays for boat repairs? Should richer family members provide more funds for upkeep? How can handiwork for repairs, cleaning or renovations - or "sweat equity"- be taken into account? What financial, legal and administrative agreements need to be reached for successful sharing? How should owners plan for the next generation of users? When is multiple inheritance feasible?This is a "must-read" for anyone faced with planning how to "pass it on". In fact I think it provides a useful set of guidelines for sharing other types of accomodation. I particularly liked the idea of the "Boast Book" - a journal of tasks and improvements left in the cottage in which sojourners record their contributions. Moments spent at summer houses certainly provide lasting memories. I wish my in-laws had talked about these issues long ago.8 of 9 people found the following review helpful. Passing It OnBy Joseph Wesley Zeigler"Passing It On" is a major achievement. Written by a sociologist, but not dry/abstract: it's full of wonderful human-interest stories.The book is about second (vacation) homes, and how families share and inherit and strive to keep them going. Author Balfe and her brother (Ken Huggins) have also written a companion book ("How to Pass It On") which gives more specific how-to information. The reader should buy and read both.I married into a vacation home on an island in Maine. One of 24 houses on the island. First, it was owned by my in-laws; now it's owned by my wife and her brother; and we've set up a system to maintain/preserve the house. Both generations in our families (current middle-aged adults and their children) are very committed to the house; but this is not always the way it is - so I read "Passing It On" and "How to Pass It On" with both interest and concern.In January, I sent a memo to 75

other people involved in houses on our island. There I said, "'Passing It On' and 'How to Pass It On' are an important resource for anyone who's facing disposition of property (and that's all of us!). It's a scholarly work, but it also full of very human stories of people like us. So do buy and read. If lots of you have done that by next summer, and you'd like to talk with Judy, I'm sure she'd be very pleased to come to our island for a week-end."

A sociological study of the issues involved in sharing the inheritance of summer houses, *Passing It On* fills a critical niche in the literature on estate planning. It focuses on the family dynamics involved in sharing real property rather than on the legal issues of estate reduction, with extensive quotes from over 100 respondents, all summer-house heirs, about how they have managed to keep the property in the family over generations.

This book is a tale of summertimes and their green paradises. Balfe introduces us to the playing...and the rituals...through which relatives are attracted to the same place year in, year out...Balfe's subtle description of familial loves and rivalries is embedded in the best intellectual tradition of classical theorists...[An] analytical as well as stylistic masterpiece. -- Remi Clignet, Emeritus Professor of Sociology, University of Maryland

From the Author: As one of four second-generation heirs to two summer houses, I have used our personal experience as springboard to this inquiry of 125 respondents as to the difficulties - as well as the satisfactions - involved in sharing a vacation home that all hold dear.

About the Author: Judith Huggins Balfe is Professor Sociology at the City University of New York, at two of its units: The College of Staten Island and the Graduate Center. Her many publications focus on the sociology of the arts and culture, in which she examines one of the primary themes of this book: the conflict between price and value, between market forces and what people find most meaningful. In analyzing the connections between these seeming polarities, she draws upon her experience as a co-owner of a summer house in Nantucket -- the basis of this extended study.