

Estate Planning Agreement for Shared Family Property

Date: _____

To: [Family Member Names]

From: [Your Name]

Subject: Estate Planning for Our Shared Family Property

Dear Family Members,

As we navigate our responsibilities regarding the shared family property located at [Property Address], it is important that we discuss and formalize our estate planning strategies. This letter serves as a preliminary outline of our intentions and agreements concerning the distribution, management, and upkeep of the property.

1. Property Details

Property Address: [Property Address]

Ownership Details: [Specify how the property is owned, e.g., jointly, in trust, etc.]

2. Intended Actions

We propose the following actions regarding the future of the property:

- Designate a primary contact person for property management.
- Establish guidelines for property maintenance and expenses.
- Outline procedures for the event of sale or transfer of ownership.
- Agree on the distribution of the property upon the passing of any family member.

3. Next Steps

Let's schedule a family meeting to discuss these matters further and finalize our estate plan. Please let me know your availability within the next two weeks.

Thank you for your cooperation and commitment to preserving our family's legacy.

Sincerely,

[Your Name]

[Your Contact Information]