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Inheritance Events: Perceptions of Actions That Involve the Giving and Receiving of Things

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Abstract: To explore perceptions of inheritance events, people were asked to describe arrangements they regarded as having "worked well" or not. This approach was productive. It yielded narratives that covered positive and negative arrangements, contributed by younger and older adults (mean ages 18 and 45 with few signs of age differences). Selected for closer analysis were 56 narratives involving things rather than only money or land. The aims were to investigate what distinguishes actions viewed positively or negatively, and whether inheritance giving and receiving is like gift-giving and gift-receiving. Analysis brought out the need to separate two routes to acquisition (direct gifts and "family works it out"), and distinctions among actions (e.g., actions treating objects as "treasures" or "commodities"). They also brought out concerns with distributive and procedural aspects of actions. There was a reasonable fit between the results and general proposals about gift giving and receiving. Some redefinitions, however, were needed for concepts of "commodity" and "reciprocity". The results add to our understanding of why inheritable things matter and the features of inheritance-related actions that people regard as significant.

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1. Introduction

A major concern in inheritance analyses is the nature of what matters to people, influencing their actions and their responses to others' actions. To help specify what is significant, the present study focuses on a particular kind of outcome to actions: the approving or disapproving judgements that people make. [1]

The presence of such judgements is not in dispute. Inheritances are often described—along with other forms of gifts—as part of a "moral economy" (CHEAL, 1988) and as closely linked to a sense of obligations and of justice (e.g., FINCH & MASON, 2000; MAUSS, 1954; MILLER, 1993; STUM, 1999, 2000). What differentiates actions that are approved or greeted with warmth from actions that are disapproved or disliked, however, is far from clear. That gap prompts three features to the present study. The first is a focus on the distinctions people draw among inheritance actions. The second is a focus on actions that involve the giving or receiving of things. For these items, what differentiates approved from disapproved actions is especially unclear. The third is the use of a narrative-based approach, with people asked to give descriptions of arrangements they regarded as having "worked well" or not. Background material for each of these features provides a background for the study as a whole. [2]

1.1 Focusing on judgements and distinctions among actions

Analyses of inheritance events often focus on the nature of practices: on what people do or do not do. Historical analyses of land transfers provide a classic example, with inferences then drawn about the importance placed on whether actions achieve some particular goals: goals such as the maintenance of a family's wealth or status (e.g., GOODY, THIRSK & THOMPSON, 1976). [3]

In a more direct approach to what is regarded as significant, people may be asked how they view various actions: actions that have occurred or that might be taken. People may be asked, for example, whether they felt the distribution specified in a will was fair or unfair (SUSSMAN, CATES & SMITH, 1970), how they would distribute money among children who vary in need or merit (DRAKE & LAWRENCE, 2000), or how they felt about inheritance events they had experienced (e.g., FINCH & MASON, 2000; STUM, 1999). [4]

This second approach highlights the features of actions that people take into account when they judge or react to various inheritance actions. Out of that approach, for example, comes a recognition of the extent to which people judge actions by the way these actions mark personal and family relationships (FINCH

& MASON, 2000), and of the extent to which people respond not only to the distributive features of an action (who gets what) but also to procedural aspects (how any decision or distribution comes about: STUM, 1999, 2000). [5]

1.2 Focusing on actions related to things

Arguments for a focus on things are of several kinds. The first emphasises *the gap between the relevance of things to most people and the limited extent of research attention.* Within analyses of inheritance in contemporary societies, decisions and judgements about money and property attract the most research attention. They may, however, be significant only to a small group of people (STUM, 1999). [6]

The second argument takes the form: *Actions that involve things attract especially strong feelings about what should occur.* Things have been noted, for example, as often the source of the sharpest family conflicts (e.g., CLIGNET, 1992). That strength does not fit Emile DURKHEIM's (1978) view that modern life and the easy replaceability of most things would see the inheritance of objects lose its significance. It does, however, fit with arguments to the effect that things may lose their instrumental significance but remain emotionally and interpersonally significant. Things serve, for example, as markers of relationships, as interpersonal "tie-signs" (GOFFMAN, 1971), as ways of constructing and maintaining a sense of the past (BELK, 1990). They offer as well a positive view of inheritances, emphasising inheritance occasions not simply as times of loss but also as times of "investment": times of "constructing oneself in the family's memory" (MARCOUX, 2001, p.216), placing objects with people who, in making space for these items, make space also for the giver. [7]

The third argument is of particular importance for the study of inheritable things. It has to do with *the availability of some specific proposals about what people regard as significant.* A great deal has already been written about the nature of gift-giving and gift-receiving (e.g., MAUSS, 1954), about the social life of things (APPADURAI, 1986), and about the extent to which gifts are part of a moral economy (e.g., CHEAL, 1988) or a political economy (e.g., GREGORY, 1982). [8]

The present study is in no way a test of large theoretical positions. Those positions, however, contribute several proposals that are specifically relevant to perceptions of inheritance-related actions. One proposal, for example, is that people make some particular distinctions among things, differentiating among them in terms of their symbolic value as indicators of biological ties, status, or relationships (e.g., MAUSS, 1954; MILLER, 1993). A second proposal is that people make some particular distinctions among actions: distinctions especially between actions that treat things as gifts from those that treat them as commodities (e.g., MAUSS, 1954), and actions that fail to distinguish between must be kept—or passed on only across generations—and what may be traded (e.g., GODOLIER, 1999; WEINER, 1993). A third proposal has to do with reciprocity as always expected (e.g., MAUSS, 1954): a form of obligation that may conflict with the wish to believe in uncalculated giving (e.g., GODOLIER, 1999). [9]

In effect, for the analysis of what people regard as the significant features of various inheritance actions, actions that involve things have the particular advantage of allowing us to ask how far judgements about them fit with some already available proposals about the general giving and receiving of gifts. [10]

1.3 Rationale for a narrative-based approach

In some content areas, it is possible to decide in advance what people will regard as significant and then to construct descriptions of actions that are in line with these features or not. We know in advance, for example, that judgements about actions that involve the inheritance of money often take into account whether a distribution is equal or not, and whether it is responsive to variations in qualities such as need or merit (with merit defined in terms of contributions to the care of parents). We can then ask people to comment on actions that give priority to equality, need, or merit. We can also ask people to distribute a set amount of inheritance money among children who vary in need or merit (DRAKE & LAWRENCE, 2000). [11]

For inheritance actions that involve things, however, we are not yet in a position to pre-select significant features or to construct contrasting situations. Rather than making decisions in advance that could miss a great deal of what people regard as significant, we have adopted a procedure that casts a wider net: asking for descriptions of arrangements that people felt "worked well" or not. Broad-net approaches are to be found in studies other than analyses of inheritance events: in studies, for instance, of interpersonal relationships and obligations (e.g., FLETCHER & FITNESS, 1996; HASLAM, 2004; LERNER & MIKULA, 1994). Two broadly focussed studies of inheritance arrangements provide useful baselines for the approach taken in the present study. [12]

1.3.1 A first baseline study

In the course of a study of inheritance patterns documented by way of wills, Janet FINCH and Jennifer MASON (2000) noted the rare incidence of personal items (lawyers discourage their inclusion). They accordingly added a series of interviews on the topic of experiences with those items. The interviews were unstructured. The 98 English participants ranged in age between 18 and 89, with many of these (67%) related to one another (FINCH & MASON, 2000, p.23). [13]

These interviews brought out (1) the depth of feeling expressed (more emotion expressed in comments on personal items than in comments on items that had appeared in wills), and (2) three particular aspects to patterns and judgements. [14]

The first is *a distinction between two main routes to acquisition:* a distinction drawn by the researchers. In one route, items are chosen for particular individuals and left specifically for them. In the other, people choose one or more of the items available, usually in combination with other family members. The first route carries more the notion of a gift, with feelings likely to be influenced by ideas about ideal and lesser forms of gift. The second route—recognised as more likely to be "difficult and disputed" (FINCH & MASON, 2000, p.145)—is more likely to involve some direct recognition of others' interests, with judgements then influenced by ideas about how others' interests should be considered and how any consultation or negotiation should proceed. [15]

The second aspect is a distinction drawn by participants. It is *a distinction among objects* in terms of a particular kind of symbolic value. The items that mattered most were those seen as standing for a person or a relationship. In one informant's words: "I don't know if they're worth anything. It's just the sentimental value. It's grandma" (FINCH & MASON, 2000, p.146). [16]

The third is again a distinction drawn by participants. It is *a distinction among actions* that treat objects as "treasures" and actions that treat them as "commodities" (a category covering in this study actions in which objects are discarded, traded, sold, kept only for their financial value, or "shoved away in corners" (FINCH & MASON, 2000, p.155). The *best scenario* for givers emerges as one in which the items they care about are "treasured" and looked after by those who acquired them. For receivers, it is the acquisition of items that have high symbolic value for them as "keepsakes". The *worst scenarios* for both are when items that they see as having this kind of symbolic value are treated as "commodities". [17]

A final aspect of interest in this study is the variation in participants' age. Within the literature on things in general, there are indications that later adulthood may bring a stronger concern with possessions that carry a sense of continuity and identity (e.g., CSISKZENTMIHÁLYI & ROCHBERG-HALTON, 1981). The sample in this study is not oriented toward questions about age effects and allows no direct comparison, but the range in itself draws attention to the issue. [18]

1.3.2 A second baseline study

This study, by Marlene STUM (1999, 2000), focused only on inheritance experiences with non-titled items, reflecting her sense of imbalance between the everyday significance of personal or "untitled" items and the scarcity of related research. Asked in relation to these experiences was a set series of questions about "who was involved, what people hoped to accomplish, assumptions that were made, which items were passed on and why, and what went wrong when there were problems" (STUM, 2000, p.184). Written answers were gathered from 64 people in the state of Minnesota (55 women, 9 men), predominantly aged over 60. [19]

The answers confirmed the presence of *two routes* to items being acquired: a direct choice by the giver, or a choice made by the receiver, usually in combination with other family members. The comments quoted have more to do with the second than with the first route. Noted, however, is a particular reason for special value being placed on items that come by way of the first route: "Those items seemed special to us because we knew that's what she wanted us to have" (STUM, 1999, p.163). [20]

Confirmed and expanded were also observations on the *symbolic value* of personal items. For many, they were "a tie to the past", a sign of "who we are", a way to "somehow keep a piece of the person who died" (STUM, 1999, p.162). Not all family members, however, shared that sense of value. For some, others' valued items could be "just stuff" (STUM, 2000, p.186). [21]

A further proposal about the bases to feelings and perceptions—one that was not prominent in the study by Janet FINCH and Jennifer MASON (2000)—revolved around *a distinction among actions* in terms of whether they follow or violate the norms of distributive and procedural "fairness". The distinction between these two forms of justice is borrowed from analyses of perceived justice in courts and organisations (e.g., TYLER, 2000). Distributive justice has to do with who gets what. Procedural justice has to do with how decisions are made, with particular attention to provisions for "voice": for the opportunity to express, or to have others consider, one's own preferences or one's own view of events. Disapproved then may be actions that violate perceptions of either distributive or procedural fairness. [22]

1.4 Indicated next steps

The optimal approach at this point appears to be one of asking for open-ended narratives, with advice given on what these could cover. We need narratives that help bring distinctions among actions to the surface (a need likely to be met by asking for stories about arrangements that were felt to "go well" or "not go well"). We need also to allow narratives to cover (1) both personal and "real property" items (providing a check on whether personal items are a significant part of inheritance or whether only real property counts), (2) both positive and negative events (redressing any bias towards considering only occasions that involve difficulties), and (3) one's own and others' experiences (avoiding possible restrictions to the feelings or judgements expressed and perhaps to the views of older adults only). Those needs seem likely to be met by advice about the form that "stories" could take. Some variation in the age of participants also seems advisable. [23]

2. Method

2.1 Participants

The 139 participants were divided into two age groups. In one, the mean age was 45.6 years (*SD* = 11.9, range 25 to 62). In the other, the mean age was 18.8 years (*SD* = 0.99. range 17 to 24). The older group of 36 contained 21 women, and 15 men. The younger group of 103 contained 68 women and 35 men. This variation in age is not intended to be a tight check on the effects of age or life-phase. It provides, however, an exploratory check on the form that age differences might take. [24]

The older participants were members of the general (administrative) staff of a large Australian university. The university's personnel office sent out a letter conveying our request for participation in a project on opinions about the way people make or receive inheritances. Participation was voluntary and the time of participation, outside work time, was the staff member's choice. Participants were asked to contact the researchers by phone, letter, or email to arrange for materials, explanations, and consent forms. Participants could choose to work from a Macintosh program on disc or from a printed booklet that allowed written answers. A Macintosh laptop would be provided if needed. All enquiries and all material submitted, however, were to contain no identifying detail other than age and gender: an approach that allowed people to offer their stories freely and privately. [25]

Letters were sent to 300 general staff members, randomly selected but stratified by age groups. In all, 47 staff volunteered. Of these, four later failed to participate due to leave or work pressure. A further four who completed the task were later set aside because in age they overlapped with the younger group (they were less than 24 years of age). The response rate was reasonable, given the request for Macintosh use (slightly more than half of the university's administrative offices operate on a PC base), the approach being made only by letter, and the only incentive being the participants' own interest in the topic. Of the 39 staff members, all but three chose to work from the program on disc; 10 asked for the use of a Macintosh laptop. [26]

The younger participants were students, enrolled in a first-year psychology course at the same university. Their participation was partly voluntary. Students in this course are required to participate in 5 projects over the course of the year, chosen from an available 50-60 projects. No project should enrol more than 100 participants. We closed the list at 103. The description of the project was similar to that for the older group. Participation was in small groups of 1 to 6, varying with the students' choices of available times. Each student worked independently, with a research assistant available to help if needed. Macintosh computers are routinely available in laboratories and all students chose to work from the program on disc. [27]

2.2 Procedure

The opening instructions explained the term "inheritance story" (a description of inheritance arrangements). Participants were asked to describe arrangements that they felt had worked well or not so well, that "you would/would not like or feel comfortable with". A list of "some clues for writing inheritance stories" noted what might be covered. The things left could be large or small. They could be property, money, furniture, or small items that would have a special meaning for someone. They might be left in a will or, more informally, in a promise or a list. The stories could come from personal experience or not, and need not be elegant or long (half a typed page would be sufficient). At the end of each narrative, participants were asked to say briefly how they felt about the arrangement described. They were also asked to mark whether they viewed the arrangement as having worked out well or not, and whether the arrangement was one that had occurred to themselves, to someone in their own family, to a friend, or had been heard/read about. If participants had no story to offer, there was no need to invent one, as there would be other questions. [28]

Pilot work established that people responded easily to requests for such "inheritance stories", to being asked, if they could do so, to give one positive and one negative story, and to advice on what their inheritance stories might cover. [29]

2.3 Method of analysis

The core method consists of grouping narratives into successive categories. The first divisions were based on participants' designating their narratives as positive ("worked well") or not, and on our coding of narratives as involving personal items or not. We then divided these stories by the route followed (direct gifts and "family works it out") and, within each, established agreed-upon sub-groups. For these, we started with narratives that struck us as especially positive and then, following grounded theory (GLASER & STRAUSS, 1967), asked whether the remaining narratives called for further division. These later divisions were based on outcome (clearly negative, and "shadowed" or "mixed"), and on themes (the features that contributed to the affective outcome). [30]

3. Analyses and Results

3.1 The availability and sources of narratives

Narratives were contributed by both men and women, and by both age groups. The number of women contributing narratives (66% and 60% in the two age groups) matched their over-representation in the original total sample (66% and 58%). More of the older group contributed: 36 of the original 39 in that group (92%) compared with 61 of the 103 in the original younger (59%). [31]

For further analysis, we restricted narratives to one story per person. If a participant offered two narratives (one positive, one negative) and one of these referred to personal items, we chose that narrative. If both referred to the same content, we chose the first (including both could boost artificially the appearance of some themes). This restriction resulted in a total set of 97 narratives. [32]

Within this set, approximately half (58%) contained accounts of arrangements for personal items, either in combination with money items (39%) or as the sole content of the narrative (19%). Yielded also were accounts of both positive (55%) and negative (45%) arrangements, and of events based on one's own experiences (60%) or the experiences of others (40%). Only the last of these aspects showed an age-group difference. More of the narratives from the older group were based on their own experiences (56% for the older, 24% for the younger group). For the younger group, the main base consisted of the experiences of other family members or of family friends: a result that raises questions about how those narratives come to be known, often in great detail. [33]

For a closer look at narratives describing arrangements involving things, we first divide these into two groups: those received by direct gift and those where one or more family members made decisions about allocations. [34]

3.2 Narratives describing direct gifts (Route 1)

We begin with narratives describing arrangements that "went well", followed by those seen as having some less happy aspects, and then those felt to "not go well". [35]

3.2.1 Actions viewed as positive

The complete short narrative below, from a woman aged 55, serves as an introduction to a set that struck us as having a common base:

> "A few years ago my aunt was diagnosed with cancer ... She had all the treatment available to her and we often went to visit her at her home in the country. During this time she went through her belongings and decided before she died who was to receive what. She had things wrapped up ready for us to take home after our visit. These things were probably not valuable but had a lot of sentimental value to us. My gift was her bed. I was always fascinated by it as a child. It was large, very high off the floor, and about 120 years old. I arrived at her farm house on this occasion, and she had her son pull the bed apart ready for me to take home. I was in tears to think she could think of me at this time. I think of her everyday as I make my bed. Maybe she thought of this also. It is touching: to think how brave a person can be when they are dying." [36]

Several other narratives contain similar positive themes. A man's sister-in-law, for example, puts together "memory-boxes" for each of her children and her only sister. An aunt—without children of her own—leaves jewellery to her nieces and nephews with each piece accompanied by a note as to why she chose it for that person. A sister leaves most of what she has to her partner but nominates for her siblings some household pieces that she knew would be treasured reminders of her (a chair, a chest of drawers). Cutting across these narratives are several features. (1) The gift is *personalised*, matched to the individual. In Janet FINCH and Jennifer MASON's (2000) terms, the gift underlines the specificity of a relationship. (2) There is *no obligation* to leave these gifts. (3) This is a time when *the making of no effort would be understandable* (these donors know they are dying). (4) *No one is left out*. No dark spot is cast on a scene of generosity and thoughtfulness. [37]

Some of these features may contribute more than others to the sense that "you are special", "you were loved", or "you were remembered". They do not all need to be present, however, in order to carry the message "I remembered you". To take one example, a young woman is overjoyed when she is left her grandmother's piano. Her grandmother had remembered that she liked to play, and the gift came at the grandmother's initiative, in a family where assertiveness is described as the usual road to benefits ("there's usually a lot of bitchy wrangling and being pushy"). [38]

3.2.2 Actions seen as shadowed

The sense of an ideal gift may be diminished by questionable aspects to an action, or by an action not managing to avoid completely some of the hazards encountered. Two kinds of shadow stand out in actions that follow Route 1: (1) The giver's motives appear to be mixed, and (2) talk about inheritances retains some awkwardness, despite efforts to overcome it. [39]

In the first casting of a shadow, the sense of a personalised or uncalculating gift is diminished by *a question about motives*: by the feeling that the giver's actions stem more from the wish to avoid unpleasantness than from some special regard for particular people. There is less than pure joy, for example, in descriptions of a father carefully allotting one item each "to every conceivable claimant" and of a mother as making a list that covers every desirable item "because she knows that my sister, for all her good points, is pushy—well, she always wants the best for her children and I'm inclined to give way". [40]

A shadow may also come from the need to know what people would really like, especially if more than one person has to be considered. To make that decision, one may need to explore with possible receivers what they would like. *Talk about inheritances*, however, may be resisted by others (it may be seen as implying the death of the giver: a potentially taboo subject in families). [41]

That difficulty can end in the will-maker continuing to feel uncertain and the receiver feeling that a possible gift event has become an awkward occasion. The arrangement can easily slip into the "negative" group. Two stories, however, document these difficulties being largely overcome, with arrangements described as in the end positive. In one, the narrator's grandfather—the vicar of a local parish—calls his children and adult grandchildren together and asks each person to nominate one item that he or she would like from his house. The narrator (a 26-year old grandson) feels that speaking up at this point is "vulture like". The grandfather, however, is firm. He knows from experience, he says, that sorting things out after a death, at a time of loss and stress, is often difficult and can give rise to arguments. His wish is to avoid that occurring. If everyone will write down the one thing they would most like, he will draw up a list and that will take care of decisions. Perhaps because of his experience, he is persuasive and the family—with some hesitation still—agrees. [42]

The other narrative of this kind again illustrates the overcoming of a potentially negative tinge to arrangements. Because the narrative describes consulting over time, concern that others may find the arrangement "morbid", and a detailed knowledge of arrangements by one of the people not directly consulted (a 30 year-old grandson), we note this arrangement at more length (it is still abridged). [43]

The narrator's grandmother asks each of her 5 children, in the course of their visiting, to take a turn at leaving their name under an item they would like to inherit, with no second item to be added until all 5 have had a turn. The grandmother then assembles a list. "Luckily, there is no arguing; each of the children has different interests or different tastes … My Grandmother chose to do it this way because she doesn't want anything to come between her children when she is gone. As a lawyer, she has seen the effect family disputes can have on individuals and how they don't always act rationally in the face of grief … Some people who are not in the family think it is a bit morbid to discuss who will get what while she is still alive. But my Grandmother works very hard to keep her children together … She quite likes knowing who likes what … She wouldn't have had the opportunity to find out which things her kids would enjoy most if she didn't do it this way … The house will be sold when she dies and the money split among the 5 children." [44]

3.2.3 Actions seen as negative

Four forms may be distinguished: (1) A gift is unwanted (it may even be a burden); (2) a wanted gift goes to "the wrong person"; (3) there is no gift (one is left with "nothing"); (4) consultation occurs but its hazards are not overcome. As was the case for actions seen as positive, some of these forms may co-occur in the same narrative. [45]

An *unwanted gift* leaves the receiver with no sense of being recognised and cared about as an individual. The item received is typically a poor match to a person's interests. In one example, a mother leaves her son a share of the tea towels and teaspoons that meant a great deal to her. He recognises that they were "special to her", and feels they must be kept, but they are "irrelevant" and "not my kind of thing". In another, the gift brings with it unwanted expense and effort (e.g., a car comes without the funds to carry out some expensive maintenance; household contents are left with instructions to choose some but also to organise donating most of them to various charities). [46]

That sense of personal recognition is also not met when an individual's interests are bypassed and an item goes to *"the wrong person"* (e.g., "The table I especially wanted because it meant so much to my mother went to a cousin who liked it mainly because it was worth money"). Receivers can, however redress some kinds of imbalance (e.g., "I knew my sister wanted that more than I did, so I gave it to her and kept the one thing I seriously wanted more than anyone else did"). [47]

The third base to the feeling of a negative arrangement occurs when *an individual is left* "*nothing*"*.* Striking in narratives about being left "nothing" is the phrase "not even": "not even a cereal bowl", "not even photographs, a mother's ring, any sentimental items". It is apparently one thing to be left "nothing" in the form of money or property. "Nothing" in the way of personal items as well appears to carry a special sting, to be a total denial of one's existence or relevance. [48]

The last aspect is the sense that *the giver's attempts to explore others' interests create problems rather than solve them*. A mother, for example, asks her daughters—"on each and every visit"—what they would like from the house, to the point where they feel their visits are no longer pleasurable. Another selects objects—"it seems almost at random"—and offers them, creating the awkward task of how to decline. [49]

3.3 Family members "work it out" (Route 2)

This route comes into play when an individual leaves no instructions or minimal instructions (e.g. a few items are specified but the bulk of personal possessions is left unspecified, with members of the family expected or asked to take the next steps). [50]

The route actually takes two forms. In one, all decisions are handed over to one or two persons, who then act in executive fashion and decide who should receive what. Chosen most often are family members who are themselves beneficiaries as well as decision makers. In the second form, all or most of "the family" work towards some agreement on a division or on a procedure that will allow a division. These sub-routes may coincide. The "executive" siblings, for example, may find that the rest of the family feels free to be involved. We shall, however, concentrate on the second form ("family works it out"). It is the more common of the two within our set of narratives: a result in line with the English study by Janet FINCH and Jennifer MASON (2000). We shall again start with positive narratives and then consider arrangements that are seen as shadowed, and as completely negative. [51]

3.3.1 Actions viewed as positive

Two kinds of arrangements stand out: (1) The decision makers are thoughtful of others, and (2) the family shows its strength as a unit. [52]

Thoughtfulness toward others is nicely illustrated by the actions of a daughter after her mother dies (these actions are described by *her* daughter). The mother—the only child in her family—starts by returning, to those who gave them, items given to her mother. She then gives "something else meaningful" (not an earlier gift) to her mother's relatives and friends. Even her ex-husband ("they haven't spoken for years") is included: "he always had a close relationship with my grandmother". In effect, the tie that counts is one of affection and not biology. The narrator is impressed. "I know my grandmother would have been very happy with the way it was done and with the pleasure that her small possessions gave to people. It was a lot of work. I don't think I would do it that way. I'd probably just have a garage sale." [53]

Thoughtfulness is also the hallmark of actions in which a group of siblings invites into the decision-making group a widowed sister-in-law, asking her to choose items for herself and for her children (an exception to the more usual procedure of excluding in-laws). "The family", in this narrator's words, "has always stood by us and counted us in". Thoughtfulness is as well the hallmark of actions in which senior members of the decision-making group consider junior members of the family. A grandmother, for example, promises a 6-year-old that a gold necklace she admires will be "hers". The child's mother remembers the promise, keeps the necklace in a special place, and transfers it at the promised age of 18. In a similar action, a grandmother minds and maintains for a year a car promised by her husband to a grandson, transferring it ready for use as soon as the grandson acquires a license. [54]

Those actions are the work of individuals. Positive also are actions that give people the sense that *"the family works well"* as a unit. In some of these instances, the family has in mind—before a death occurs—a plan or a custom that avoids the need for invention at a time of stress. To take one example, a grand-daughter describes her family as "always knowing" that when people die, you first give back to the donors gifts that they have made during their life-time: "It would be awful if you saw something you've given sitting on someone else's table". They also knew, from talking with each other, which items each was especially fond of: "who wanted the cuckoo clock etc.". Even without a plan in mind, however, a family may still act effectively. "We pulled together"; "we rose to the occasion"; "we managed it by ourselves, amicably"; "we did it all without argument"; "we did it ourselves, without a lawyer". [55]

In phrases such as these, it is tempting to read in a sense of surprise and relief. The feeling is, in any case, definitely positive. Clearly positive also is the sense of pride that comes with a story about passing on a tradition. A great-great-grandfather, for example, gives his gold watch and chain (an award to him from his workplace) to his eldest son, with the request that in each generation, it be passed on to the eldest son. The narrator is not in line for the next transfer but admires the continuity and is proud of what it says about "the family": "it's good to feel that there's trust and tradition here". [56]

3.3.2 Actions seen as shadowed

As was the case for Route 1 (direct gifts), the sense of a positive arrangement can be diminished by some negative aspects or by some hazards not fully avoided. As illustrations, we take instances where (1) the family pulls together but only after an initial period of argument: a period in which achieving agreement is uncertain, and (2) an action taken for the sake of "the family peace" is later regretted. [57]

Recovery after a poor start requires no special comment. We might almost expect difficult starts in situations where there are few established customs and several principles may be called upon, with some family members arguing for seniority as the deciding factor and others emphasising gender or "real interest". [58]

Later regret for a "good" action is a less obvious concern. That regret may be expressed by a later generation: the one that would now like to inherit what was not acquired. To take one example: "My mother was asked to choose some things but, as far as I can see, she didn't ask for anything really major. I'd have asked for more. There were some really nice things that she felt she didn't want to fight for." "How could she have just accepted being given so little?" says another. The sharpest comment, however, comes from a woman, now in her early 60's, who recalls an event from 30 years earlier. [59]

In that narrative, a mother dies first, leaving "everything to my spouse". The father continues to live in the house. When he is about to move, he earmarks all the pieces in the mother's china cabinet. Marked as for the narrator is a "crystal set". She already has one and offers it to her sister. At this point, the brother speaks up and says he and his wife would like the set ("he is really into possessions"). The narrator is not particularly happy about the request but agrees for "the sake of the family peace". Now, however, she regrets that action. She feels that her children may wonder why she so easily "gave way". She is clearly asking herself that question. [60]

3.3.3 Actions seen as negative

Three kinds of actions stand out. The first inverts a theme seen in the positive narratives: In various ways, family members are not thoughtful of one another or alert to their interests. The second is a further inversion: The family fails to pull together. The third has no direct earlier parallel. "Working it out" is now by auction, either in acceptance of a bequest-maker's decision, or on a family's own initiative. In effect, to borrow a verb from Igor KOPYTOFF (1986), the arrangement has become "commoditised". [61]

In the gentlest form *of not being thoughtful or alert to others' interests*, members of the family act "efficiently". In executive fashion, for example, an aunt decides that most of the items in a sister's household are "of no value". They can be discarded or, possibly, sent off to a charity. She knows that some items have been promised to the grandchildren but she does not regard those promises or interests as "serious". Out then go the gloves of an earlier era that a young grand-daughter had been promised, had hoped for, and still regrets not receiving because they were for her quintessentially "just grandma". [62]

More grossly, family members take items for themselves, without consultation with others. "Taking" is described in many narratives, in terms that range from "helping themselves" to "grabbing" or "pilfering". Feelings seem to be especially negative when the action is taken with "indecent haste" (e.g., a wife dies, a husband dies shortly after but his will still says "all to my wife"; the relatives of both "immediately dive in" and movable items such as cash and jewellery simply "disappear"). Highly negative are also the comments made when the original owner is not yet dead (e.g., he or she is now in a nursing home but is still some distance from death) and when there is no direct kinship entitlement. Two sisters-in-law, for example, remove jewellery left to a daughter by her mother. She has blocked the sale of her parents' second house ("a family holiday house"), and with that the distribution of proceeds among the three siblings. In effect, they take from her just as they perceive she has "taken" from them. [63]

Not being thoughtful or alert can characterise actions by a single family member or by several. Somewhat different, however, are actions where *the family fails to act as a unit*. "We should be able to agree!" says one narrator. "And we're supposed to be a family! We're not even a large family and we still can't manage an agreement" says another. Instead of difficulties being "patched up", relationships "turn cool" or "rifts" occur that can "last for generations". Two branches of a family, for example, cannot be invited to the same celebrations. They "don't talk to one another" or, in one interesting description, "their only communication is by Christmas cards and they send out hundreds of those". [64]

In the third and last form of actions seen as negative, working it out is through the procedure of an *auction*. In one of these narratives, the family decides to hold a family-only auction. Each member of the family is given as "a working budget" an equal share of the estimated total value of the goods at issue. (They cannot use their own money, so the richest have no advantage, and their bids must stop once they have reached the set ceiling). The proceeds will then be divided equally among the several siblings. The narrator (a friend of one of the siblings) finds the procedure "intriguing" but notes that it still did not avoid "some harsh words" between two who wanted the same item. [65]

In the other auction narrative, it is a grandfather who, in his will, states that all his household goods and personal possessions are to go to auction. If people want a particular item, they can then bid for it but the proceeds form the total auction are to be divided equally among his children. The narrator in this case—a daughter—felt strongly negative (she was a daughter). It was, she felt, a "cold" way to act. We had seen an action of this kind described in the pilot study and were ourselves "intrigued" to the point of asking all participants in the present study (after they had offered their own narratives) how they felt about a grandfather taking this kind of action. [66]

We shall combine the two age groups (no clear sign of differences). A minority—close to 20%—did not feel strongly negative toward the grandfather's action. The reasons offered were of several kinds. The arrangement was "fair" (the proceeds were divided equally). It was understandable ("he was probably pretty old and there could have been a lot of grandchildren". People could get what they wanted "if they really wanted something". And it was "after all his decision to make. It was his stuff". The majority, however, took a negative view. This was a public auction, and "family items could go to strangers". It "put family members in competition with one another". And, above all, it was "commercial". "Everyone needs a keepsake, a memento" but here they "had to bid for something" and "that's not the same as being given something". The distinction between "treasures" and "commodities", in several guises, is apparently strong. [67]

3.4 A special negative event: Being left "nothing"

By either route—direct gifts or members of the family "working it out"—family members may find themselves being left with "nothing" and then faced with a moral dilemma. Are people ever justified in taking personal items without consulting others or gaining their assent? A son, for example, finds that his father has left "everything" to his second wife. She offers neither mementos nor the opportunity to choose some. The son—with some "anguish"—describes himself as taking a pair of wooden salad servers, "worth nothing" but often used by his father. Without these, he has "nothing concrete that stands for my father and me". [68]

Second families seem to often be part of narratives that end with some family members feeling they have been left with "nothing". Items that should stay "in the family", for example, are described as going to a second wife or a second husband and then becoming earmarked for *their* children from earlier marriages, even though these had what is described as "no relationship" to the original owner. [69]

A longer narrative details a longer set of justifying circumstances and underlines the moral quality to many judgements. This time no second family is involved. There is still the same sense, however, of the new possessors as having no real entitlement to personal items. The narrative starts with a relative finding that a family member (childless) has left her "estate and personal possessions to a religious cult, leaving nothing to her actual friends and relatives. My mother" (the narrator is her 21-year-old daughter) "was deeply upset … she believed that there were many items that rightfully belonged to the family, most especially some poems that my uncle had left to her". Several circumstances justifying objection and the removal of some items are then noted. "In Alice's moments of clarity, she actually told my mother to take these poems and to distribute her personal items that belonged to the family among those that deserved them." "Several discussions with Alice's friends" were also in favour of this kind of action, and "my mother decided to take home those things she believed should not go to some religious sect that would just use them to benefit themselves … the sect did not have a good reputation" (in effect, they represent an "unworthy heir"). "My mother didn't want to battle over the estate, that was Alice's to do with what she liked, but she did take home several items: an old clock, jewellery—some fake, some worth a bit, pieces of writing by Alice and my uncle. Ultimately … a verbal agreement was reached so that my mother could remove things of both monetary and personal interest to Alice's relatives." [70]

A long list indeed of justifications: Here is an action that is felt to be warranted in the face of an outcome seen as completely negative for the family and as a moral wrong. At the same time, it is felt to be an action that can only be taken reluctantly, however good one's reasons. [71]

4. Discussion

We began with three aims. One was to explore the feasibility of a narrative-based approach to the judgements and distinctions people bring to inheritance-related actions. The second was to specify and consider the distinctions people made among actions. The third was to ask whether what we observed could be adequately covered by proposals already offered for gift-giving and gift-receiving in general. We now return to those aims and add comments on some possible further steps. [72]

4.1 The feasibility of a narrative-based approach

A narrative approach has clearly been a productive way to bring perceptions and distinctions to the surface. Demonstrated also is the feasibility of gathering narratives without interviews, in already written form. Possible now is the taking of more structured steps. We may, for example, select some of the actions described and ask people to comment on them. From the narratives, we may also draw statements that express various concerns, with these then rated for the degree to which people agree with them or for the extent to which they are part of an individual's thinking about particular inheritance events. [73]

The narratives have also served as a productive base for bringing out a useful analytic step. This is the separation of two routes to acquisition: by a direct gift from the original owner or as part of family members making the decision. That separation is in line with a long-standing approach in anthropology: an approach that consists of distinguishing among objects by their usual or possible routes of movement (e.g., RIVERS, 1910). The separation also brings out the ways in which different routes may differentially involve several bases to judgements. Especially relevant to Route 2, for example ("family to work things out"), are likely to be the views people hold about who should be included in "family" discussions, the importance of not acting unilaterally, and how competing interests should be managed. [74]

4.2 Distinctions among actions: Over-arching features

We have drawn out a number of specific features to various actions: features that contribute to the perception of what has "worked well" and what has not. Cutting across these, we suggest, are two general qualities. These are the implications of actions for relationships among the people involved, and the ways in which actions combine several of the qualities that lead to their being regarded as "positive" or "negative". [75]

4.2.1 Implied relationships

That inheritances are statements about relationships is not in dispute. At issue, however, are the ways in which actions are linked to particular aspects of relationships. [76]

As a minimal step, for example, inheritance arrangements emerge as needing to acknowledge the presence of a relationship. To be left with "nothing" definitely moves an arrangement into the category perceived as "negative", especially if others seen as less entitled receive acknowledging gifts. To act as if what one has received is "nothing"—discarding or "trashing" what has been given—is an equal denial. [77]

At the other end of a possible scale are actions that mark the specificity of a relationship: a special closeness or a special regard. These are clearly regarded as "positive". A personalised gift that is matched to one's interests or to a shared history, for example, goes beyond acknowledgement as kin. Added is recognition as an individual. In contrast, bequests that are unwanted or mismatched, or that go to "the wrong person" may acknowledge the relationship of "family member" but draw no distinction between one family member and another. Treating everyone as alike may be regarded as positive when money or property is at stake. Where personal items are involved, individualisation is clearly valued. [78]

The relationships at issue, however, are not only between two people: the bequest-maker no longer physically present and the individual who receives some item that once belonged to the other. At issue are also relationships among the surviving family members. The positive actions then are those that do not set family members at odds with one another. These actions may be taken by the bequest-maker. They may also be taken by the survivors. Hoped for and approved are actions that show how they "pull together", "work things out amicably", "consider each other", and take "a long-term view" of family functioning". Deplored then are actions that do not have these qualities, or that make the resolution of differences less likely to occur. Actions that achieve both specific and family relationship goals seem likely to be especially approved. [79]

4.2.2 Combining positive or negative features

Actions may be distinguished from one another, we have suggested, by the relationships they acknowledge or strengthen. Some may do so for one relationship but not others. Some may manage to cover several relationships. In similar fashion, some actions may manage to combine attention to short-term and long-term consequences, to biological and affectional ties, to one's own interests (or those of one's children) and the interests of one's siblings, to the need for consultation and for care in talking about inheritances. These several concerns may pull in different directions. Regarded as positive, however, are likely to be actions that manage to cover both or that balance them in ways that we would also do. Inheritance events, that kind of description implies, are always likely to bring more than one principle or goal to the surface. We have a great deal yet to learn about how these are balanced. Overall, however, approval may be regarded as linked to the perception that they have been effectively combined or given appropriate weights. [80]

4.3 The relevance of proposals about gift-giving in general

In the introduction, we drew attention to three proposals that cut across several accounts of gift-giving and gift-receiving and have particular relevance to the inheritance of things. [81]

The first is that the significance of things lies in their symbolic value: in the way, for example, that they stand for or embody a particular person or a particular relationship. That proposal certainly applies to inheritable things. [82]

The second is a distinction between gifts and commodities, or—in Maurice GODOLIER's (1999) and Annette WEINER's (1993) argument—between what must be kept and what may be traded. That proposal also clearly applies. Some of the features that may make a gift unwanted, or that signal treatment as "commodities", however, may now take a special form. Status as a commodity, for example, may now be signalled not by an item being sold but by its being kept without being honoured. "Shoved away in cupboards" is one description; "kept only because it cost a lot of money" is another. Both are a far cry from Philippe ARIES' (1983) description of inherited items being kept in prominent places or becoming part of the new owner's daily life. [83]

The third is the argument that all gifts carry some expectation of reciprocity. In Marcel MAUSS' (1954) classic analysis, all gifts carry some expectation of a return, even though we may like to feel that there is a sharp divide between the world of commerce or exchange and the world of pure, uncalculated gifts for which no return is expected. [84]

Reciprocity is the proposal that might at first seem to apply least well to inheritance bequests. It seems less likely, for instance, that an inheritance gift will bring with it feelings of humiliation because one cannot reciprocate as generously (cf. MILLER, 1993). The return gift may also take a different form from what it does when both parties are alive. There are, however, clearly expectations or hopes that the new possessor will be appreciative, will treasure what has been received, will remember the giver and keep his or her memory "alive" and, in time, will also maintain family solidarity and—perhaps—treat the next generation with equal or surpassed generosity. Any theoretical account then needs to address not the question of whether reciprocity applies to inheritance bequests but the form of return that is expected—by the giver, the receiver, and the people who may judge the receiver—and the degree of severity with which people regard any violation of these expectations. [85]

4.4 Some indicated next steps

There is still much to be explored in relation to the judgements and feelings associated with inheritance events. From several possible directions, we select some related to the content of the ideas people hold and to two circumstances that may be associated with variations in those ideas: age and cultural background. [86]

4.4.1 The Ideas people hold: Aspects of content

Indicated already is the need to know more about what people may "reasonably" expect to receive and what they perceive as the obligations that go with any item. Suggested also is the need to know more about expected forms of *timing.* Why, for instance, do people use phrases such as "before the body's even cold"? Respect for timing might be seen as a form of respect for the dead or as a form of return for what one has received or might receive. At this point, however, timing is one of the strongly felt expectations about which we know relatively little. [87]

Large also is the gap in relation to the *attributions* people make for actions, especially for actions that do not follow established or expected patterns. In most psychological studies of how events give rise to various emotions or judgements, attributions are a critical part of the sequence (FLETCHER & FITNESS, 1996, provide several examples). The same action, for example, might be interpreted as based on good or poor intentions. When a will is not changed after a second marriage, for instance, is this seen as a sign of where the heart still lies? As forgetful? As something that an individual "just didn't get around to", "left too late", or "avoided because it was all about death"? The interpretation must make a difference to the way the action is judged both by a second partner and by all those who now inherit or are left out. [88]

The last gap to note goes back to distinctions between *gifts and commodities* or between what must be kept and what may be traded. Igor KOPYTOFF (1986) has added the argument that "gifts" and "commodities" are end points to a continuum rather than total opposites. They are also not static categories. Items that have both sentimental and financial value may be especially likely to shift from one category to another. Even when that mixture of values does not apply, one generation may downgrade an earlier generation's "treasure" and treat it as a commodity. In a reverse direction, one generation may upgrade as a must-keep "heirloom" an item that a previous generation regarded as insignificant. Tracking such shifts offers both a way of extending the meaning of "commodities" and of enriching our understanding of "the social life" (APPADURAI, 1986) of inheritable things. [89]

4.4.2 Variations among people in the ideas held

Variations are likely to occur both among members of a family and across social groups. For group variations, one possibility is that *age or life-phase* may be associated with differences in judgements. As an exploratory step, we sought narratives from two age groups: young adults (ages 18 to 24) and older adults (25 to 62).The aspect that most clearly differentiated between these two groups was whether the events they described were part of their own experience or the experience of others. For the majority of the older adults, the base was their own experience. For the majority of the younger adults, the main base was the experience of others in the family or of friends of the family. [90]

We clearly need to know more about how generations might differ and, to do so, to extend the age range. Adults in the 60-90 year range, for example, turn out to place more importance on maintaining family peace and harmony than younger adults do (GOODNOW & LAWRENCE, in press). We also need to ask: How is it that a young generation can often describe what has happened to others in the family, often in great detail? Inheritance stories are clearly a form of family narrative. Like objects themselves, they are a way of "constructing and maintaining a sense of the past" (BELK, 1990, p.669). Who, however, tells these stories? When and how do they come to be told? [91]

Often asked in relation to group differences are also questions about *cultural variations*. On this score, the present study offers no direct data. Relevant, however are some studies suggesting the forms that cultural variations may take. [92]

From Dennis KLASS (1996) comes the argument that the value placed on personal items varies with a culture's general orientation toward continuing bonds to ancestors and to the dead. From Alan FISKE (1991) comes the proposal that all cultures contain a distinction between what may be treated as commodities and what may not. Where they differ, however, is in what goes into each category (cultures vary, for instance, in whether people, drugs, or sex can be placed in a commodity category). From De Sophie CHEVALIER (1996) comes a report of some particular features to contemporary French households. Within these, "furniture" is often regarded as a unit, to be passed *en bloc* to one family member, often in combination with the house, rather than being divided into separate pieces that may go to different people. In addition, more people in Paris follow the one arrangement than is the case for a comparable group in London (CHEVALIER, 1996), among informants in Melbourne in the present study, and among members of the group interviewed by Jean-Sébastien MARCOUX (2001) in Montreal. In French households then, there appear to be established customs for the inheritance of household things: customs that reduce uncertainty and the need for invention. [93]

In effect, there are available several proposals that offer a base for the study of cultural variations in both the content of the views that people hold and the extent to which these are widely shared within any cultural group. [94]

5. Conclusion

The results point to a useful method and to distinctions drawn among actions. They bring out also links to proposals about gift- giving and gift-receiving in general, and the continuing importance of things and family relationships. In these final comments, we focus on the latter two points. [95]

Conceptual proposals about gift-giving and gift-receiving in general turn out to provide a usable body of theory for the inheritance of things, provided that we make some additions to how commodities are defined, the forms that reciprocity may take, and the significance of relationships and obligations not only between an individual giver and an individual receiver but also among the members of social units such as the family. [96]

The perceptions of actions involving things turns out also to offer a strong reminder of the need to consider "the material" and "the social" as belonging together. Underlined especially is the significance of family: a reminder that Janet FINCH and Jennifer MASON (2000) see as particularly needed at a time when family and inter-generational relationships are often regarded as declining in importance (KOHLI & KÜNEMUND, 2005). In Emile DURKHEIM's (1978) view of change, things are expected to lose most of their importance as an aspect of family solidarity when family members are no longer dependent on the items that a family possesses and uses in common. The instrumental significance of inheritable things may indeed be declining, undercut by the greater ease of replacement. The present study, however, points to the relational significance of things as remaining important and as continuing "to act as a cement for domestic society" and "family solidarity" (DURKHEIM 1978, p.234). [97]

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