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# Keeping the Camp:

## FAMILY DISCOVERY WORKSHEET (1/2)

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Use this worksheet to spark honest, meaningful conversations about your family vacation home. Everyone doesn't need the same answers—but everyone deserves to be heard.

Be frank as you discuss all maintenance responsibilities, time and costs.

The next generation should be aware of the efforts and resources involved in keeping such a property in the condition they have grown to love.

### Who leads the discussion?

#### *What the Property Means to Us*

- What do you love most about the lake? Think memories, traditions, feelings.
- How often do you visit? What do you use it for? (e.g., holidays, summer, hunting season, family reunions, quiet retreats)
- What are some of your favorite memories here?
- How would your life be affected if the lake property were no longer a part of your life?

#### *Hopes and Fears for the Future*

- Do you hope this property stays in the family? Why or why not?
- What does “stay-in-the-family” mean to you?
- What worries you most about the future of the property? (e.g., cost, conflict, fairness, maintenance, distance)
- What would make you feel good about a long-term plan for the property?

#### *Use and Fairness*

- If the property stays in the family, how would you want to use it? (e.g., regular access, occasional use, just to know it's still there)
- How will time at the vacation home be scheduled?
  - Often, summer months or school vacations can be particularly popular times for its use.
- Will families stay together (space permitting) or will each sibling get a certain number of weeks?
  - Is scheduling time first-come, first-served, rotational, or do families “draw straws” for popular times?
- Will other family members or friends be allowed to use unused times?
- Would you be open to sharing use with siblings/nieces/nephews/cousins?
  - If so, what would help make that sharing possible?



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## FAMILY DISCOVERY WORKSHEET (2 / 2)

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### *Ownership*

- What will happen in the case of the death of one of the family members?
- How will his or her share of the property be transferred?
  - Surviving spouse, grandchildren, or split among the remaining siblings?

### *Covering costs and maintenance*

- How should owners pay for regular maintenance and expenses of the property?
- Should there be a property manager or will each person pitch in to help with routine and emergency repairs, cleaning, yard work, winter storage, etc.?
- How are real estate taxes, insurance, and utilities paid for?
- What about remodeling or improving the home or other structures on the property?
- Who has decision-making power re: repairs, rentals and renovations?
- Can the home be rented to non-family members to help pay expenses?

### *Exit Planning*

- Would you want the option to be bought out in the future? Under what terms?
- What would feel fair for setting a buyout price? (e.g., appraisal, fixed price, adjusted for improvements?)
- What should happen if the family can't agree, or if the cost becomes too much?
- If the property is sold, how will the contents of the home, watercraft and other equipment be divided?
  - Sentimental items that have been in the family for years may need to be addressed.

### *Legacy and Leadership*

- Who in the family do you see taking a leadership role in managing the property?
- Would it be fair to compensate this family member for taking this leadership role?
  - If so, how much? Who would pay?
- What would help us avoid misunderstandings or resentment?
- What's one thing you'd like to make sure this property always stands for?

### *Next Steps*

- Schedule a time for everyone to talk through their responses—ideally in person or on a video call.



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