

Method agreement, filled in before the first pick

This sheet records family decisions during one division session. It creates no legal authority and changes no bequest.

Do not write full Social Security numbers or account numbers anywhere on this sheet.

Session basics

Name of the person who died (or a family label)

Date of the division session

Method and moderator

Agree on one method in writing before the first item is picked: a rotation draft, a lottery, sealed bids against appraised value, a sale that splits the proceeds, or a stated mix.

Method agreed for this session

Moderator (who runs the turns and keeps the record)

Choices: Rotation draft / Lottery / Sealed bids / Sale and split / A stated mix

Participant agreement (row 1)

Name and relationship

Signature agreeing to the method

Date

Method agreement, filled in before the first pick (continued)

Participant agreement (row 2)

Name and relationship

Signature agreeing to the method

Date

Participant agreement (row 3)

Name and relationship

Signature agreeing to the method

Date

Participant agreement (row 4)

Name and relationship

Signature agreeing to the method

Date

Each participant signs before the first pick. The signatures record agreement to the method, not ownership of any item.

Item rows, one row per item

Flag sentiment picks before the draft begins, and record a signed dated receipt for every item that leaves.

Item row (row 1)

Item (short description)

Sentiment pick (yes or no; initials of who named it)

How it was assigned (rotation pick, lottery, sealed bid, sale)

Appraised or agreed value

Taken by

Amount charged against that person's share

Receipt signed and dated (yes or no; date)

Notes (photo reference, condition, box or bin number)

Item rows, one row per item (continued)

Item row (row 2)

Item (short description)

Sentiment pick (yes or no; initials of who named it)

How it was assigned (rotation pick, lottery, sealed bid, sale)

Appraised or agreed value

Taken by

Amount charged against that person's share

Receipt signed and dated (yes or no; date)

Notes (photo reference, condition, box or bin number)

Item row (row 3)

Item (short description)

Sentiment pick (yes or no; initials of who named it)

How it was assigned (rotation pick, lottery, sealed bid, sale)

Appraised or agreed value

Item rows, one row per item (continued) (continued)

Taken by

Amount charged against that person's share

Receipt signed and dated (yes or no; date)

Notes (photo reference, condition, box or bin number)

Item row (row 4)

Item (short description)

Sentiment pick (yes or no; initials of who named it)

How it was assigned (rotation pick, lottery, sealed bid, sale)

Appraised or agreed value

Taken by

Amount charged against that person's share

Receipt signed and dated (yes or no; date)

Notes (photo reference, condition, box or bin number)

Item rows, one row per item (continued) (continued) (continued)

Item row (row 5)

Item (short description)

Sentiment pick (yes or no; initials of who named it)

How it was assigned (rotation pick, lottery, sealed bid, sale)

Appraised or agreed value

Taken by

Amount charged against that person's share

Receipt signed and dated (yes or no; date)

Notes (photo reference, condition, box or bin number)

Item row (row 6)

Item (short description)

Sentiment pick (yes or no; initials of who named it)

How it was assigned (rotation pick, lottery, sealed bid, sale)

Item rows, one row per item (continued) (continued) (continued) (continued)

Appraised or agreed value

Taken by

Amount charged against that person's share

Receipt signed and dated (yes or no; date)

Notes (photo reference, condition, box or bin number)

Use extra copies of this page for sessions with more items.

Running totals and equalization

Value taken (row 1)

Name

Total value taken

Value taken (row 2)

Name

Total value taken

Value taken (row 3)

Name

Total value taken

Value taken (row 4)

Name

Total value taken

Equalization

Settle any remaining gap with money or with a larger slice of the remaining assets, and write the result here.

Running totals and equalization (continued)

Equalization line (who receives what to even the shares)

These records feed the estate accounting the executor may need to file.

Fictional completed example: the Alvarez family

Every name, item, and amount in this example is invented. It shows how one family's session lands on the page, including the equalization math at the end.

Method agreement

Name of the person who died (or a family label): Ramon Alvarez (fictional family)

Date of the division session: June 6, 2026

Method agreed for this session: Rotation draft for most items, sealed bids when two siblings both want one item, one sale

Moderator (who runs the turns and keeps the record): Carmen Ruiz, aunt of the three participants

Participants

Participant: Ana Alvarez, daughter. Signed June 6, 2026.

Participant: Luis Alvarez, son. Signed June 6, 2026.

Participant: Marta Alvarez Ruiz, daughter. Signed June 6, 2026.

Row 1: sentiment pick flagged before the draft

Item (short description): Blue enamel casserole dish

Sentiment pick (yes or no; initials of who named it): Yes; MR named it before the draft

How it was assigned (rotation pick, lottery, sealed bid, sale): Uncontested sentiment pick, set aside before the draft

Appraised or agreed value: \$20

Taken by: Marta

Amount charged against that person's share: \$20

Receipt signed and dated (yes or no; date): Yes; June 6, 2026

Notes (photo reference, condition, box or bin number): Photo 14 in the family album

Fictional completed example: the Alvarez family (continued)

Row 2: rotation pick

Item (short description): Oak dining table with six chairs

Sentiment pick (yes or no; initials of who named it): No

How it was assigned (rotation pick, lottery, sealed bid, sale): Rotation pick, round 1

Appraised or agreed value: \$600

Taken by: Ana

Amount charged against that person's share: \$600

Receipt signed and dated (yes or no; date): Yes; June 6, 2026

Notes (photo reference, condition, box or bin number): Scratch on one leaf

Row 3: rotation pick

Item (short description): Table saw and workshop hand tools

Sentiment pick (yes or no; initials of who named it): No

How it was assigned (rotation pick, lottery, sealed bid, sale): Rotation pick, round 2

Appraised or agreed value: \$420

Taken by: Luis

Amount charged against that person's share: \$420

Receipt signed and dated (yes or no; date): Yes; June 6, 2026

Notes (photo reference, condition, box or bin number): Garage shelf B

Row 4: lottery draw

Item (short description): Holiday ornaments, four bins

Sentiment pick (yes or no; initials of who named it): No

How it was assigned (rotation pick, lottery, sealed bid, sale): Lottery draw

Appraised or agreed value: \$60

Taken by: Marta

Fictional completed example: the Alvarez family (continued) (continued)

Amount charged against that person's share: \$60

Receipt signed and dated (yes or no; date): Yes; June 6, 2026

Notes (photo reference, condition, box or bin number): Bins 1 to 4; photo 21

Row 5: sealed bid with the charged-against-share math shown

Item (short description): Grandfather clock

Sentiment pick (yes or no; initials of who named it): No

How it was assigned (rotation pick, lottery, sealed bid, sale): Sealed bid, high bidder takes it

Appraised or agreed value: \$800 appraised

Taken by: Luis

Amount charged against that person's share: \$1,150 winning bid (bids: Ana \$850, Luis \$1,150, Marta \$900); charging the winning bid raises what the others receive

Receipt signed and dated (yes or no; date): Yes; June 6, 2026

Notes (photo reference, condition, box or bin number): Chime checked; winding crank in the notes envelope

Row 6: sale line

Item (short description): Silver-plated tea service

Sentiment pick (yes or no; initials of who named it): No

How it was assigned (rotation pick, lottery, sealed bid, sale): Sale and split

Appraised or agreed value: \$150 sale proceeds

Taken by: Sold to an estate sale buyer

Amount charged against that person's share: \$50 credited to each sibling's share

Receipt signed and dated (yes or no; date): Sale receipt kept; June 6, 2026

Notes (photo reference, condition, box or bin number): Buyer receipt filed with the estate records

Fictional completed example: the Alvarez family (continued) (continued) (continued)

Running totals

Total value taken by Ana: \$650 (dining table \$600 plus \$50 sale proceeds)

Total value taken by Luis: \$1,620 (tools \$420, clock at the \$1,150 winning bid, plus \$50 sale proceeds)

Total value taken by Marta: \$130 (casserole dish \$20, ornaments \$60, plus \$50 sale proceeds)

Equalization

Equalization line (who receives what to even the shares): Total divided: \$2,400, so an equal share is \$800 each. Luis took \$820 above an equal share, so Ana receives \$150 and Marta \$670 from the remaining bank account. All three then hold \$800 of value.

Fictional example; every name, item, and amount is invented. A real family's numbers, and any dispute about them, belong with the executor's records and, where needed, a probate attorney.