

**Tools used:**

- Professional facilitator
- Family trust

As is the case with many family summer homes and properties, ownership of the Browns' 500-acre farmstead in a small town in the Berkshires was very complicated and only getting more so as the family grew.

The farm's ownership was divided between three generations of family members and 29 individuals who all loved the rolling meadows, deep woodlands, and vacations in the historic farmhouse. Recognizing that their complicated fractional ownership structure was too cumbersome for the family to effectively manage into the future, one of the second generation family members initiated a series of family meetings at the farm to assess their options and find a more straightforward ownership solution.

Since so many people were coming to the meeting from all over the country, this family member recognized the need to have a professional present to make the best use of their limited time together. With the assistance of a professional family therapist and facilitator, the family participated in a day-long



Photo courtesy of Bill Warren

family meeting once each summer over a three-year period. The facilitator kept the meeting on task, helped maintain civil communication and dialogue, and made sure each participant was able to speak his or her mind. With the assistance of one family member who is a lawyer, they created a trust open to all the descendants of the original family members, which kept their administration costs down since they did not need to update their documents every time a family member died or was born. A small family subcommittee oversaw the transition and drafted a mission statement for the trust that highlighted the property's role as a place to "renew family ties and peacefully appreciate the beauty and quiet of the land." Bylaws were written that guide members' use of the house and land, levy dues to pay taxes and upkeep, and establish procedures for nonpayment and election of officers.

Though the family members continue to be concerned about managing the farm's rising costs in the future, they have a solid ownership structure in place and a history of effective, healthy communication to build on.



Photo courtesy of Matt Hall