



Organize, Communicate, Prepare

Kansas Case Study 5

How much will each heir inherit?

George, a 98-year-old widower, has two children, Alice and Bob.

Alice has one child, Carrie.

Bob has five children: Dave, Ed, Frank, Gail, and Hank.

George's will leaves everything he owns to his children if they survive him, if not, then to the descendants of his children. George's distributable net estate is estimated to be \$100,000 (after taxes, creditors, and expenses have been paid).

Take the quiz below to see how much you know about what shares the grandchildren will inherit under different fact situations.

1. Assume that both Alice and Bob survive George. How will George's estate be distributed at his death?

A. Alice will inherit \$50,000 and Bob will inherit \$50,000.

B. Alice, Bob, and their children will inherit \$12,500 (\$100,000 divided eight ways)

2. Assume that George passes on. He is survived by Alice's daughter Carrie; Bob and Bob's five children. At George's death, how will his estate be distributed?

A. Bob will inherit \$100,000.

B. Bob will inherit \$50,000 and Carrie will inherit \$50,000.

C. Bob, his children, and Carrie will each inherit \$14,285 (\$100,000 divided seven ways).

3. Assume that George passes, survived by Alice, Carrie, and Bob's five children. At George's death, how will his estate be distributed?

A. Alice will inherit \$100,000

B. Alice will inherit \$50,000, and Dave, Ed, Frank, Gail, and Hank will each inherit \$10,000.

C. Alice, Carrie, and Bob's five children will each inherit \$14,285 (\$100,000 divided seven ways).

4. Assume that George passes on survived only by his grandchildren. How will his estate be distributed among his grandchildren?

A. Carrie will inherit \$50,000 and Dave, Ed, Frank, Gail, and Hank will each inherit \$10,000.

B. Each of the grandchildren will inherit \$16,666 (\$100,000 divided six ways)

C. Alice and Bob's shares will be distributed as they each directed under their wills.

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5. The answers to the first four questions are different if Alice or Bob are survived by spouses.
 True
 False
6. If George dies without a will, how will his estate be distributed if both Alice and Bob pass on before him under Kansas law?
 A. Carrie will inherit \$50,000 and Dave, Ed, Frank, Gail, and Hank will each inherit \$10,000.
 B. Each of the grandchildren will inherit \$16,666 (\$10,000 divided six ways)
 C. Alice and Bob's shares will be distributed as they each directed under their wills.
7. George's will can direct that if both of his children pass on before him, his grandchildren will share equally.
 True
 False
8. If George's will leaves his property to the survivor of his two children, and Bob passes on before George, Bob's five children will be disinherited.
 True
 False

Adapted for use in the Legally Secure Your Financial Future program; prepared originally for a national template program by [Carol A. Schwab](#), J.D., LL.M., former professor & Extension Specialist, NC State University.

Adapted for Kansas use by Carol Young, Extension Specialist Financial Management, Shon Robben, Attorney, Arthur-Green, LLC, 1-28-08.

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Case Study 5 Answers

See 'KSU Wills & Estate Planning' document for more details.

How much will each heir inherit?

The following answers are based upon Kansas law as of January 2008. The laws in other states may be different. Laws are subject to change, please ask your attorney for answers to specific personal questions.

1. Assume that both Alice and Bob survive George. How will George's estate be distributed at his death?

Kansas answer: A

Alice will inherit \$50,000 and Bob will inherit \$50,000.

2. Assume that George passes on. He is survived by Alice's daughter Carrie; Bob and Bob's five children. At George's death, how will his estate be distributed?

Kansas answer: B

Bob will inherit \$50,000 and Carrie will inherit \$50,000.

3. Assume that George passes on, survived by Alice, Carrie, and Bob's five children. At George's death, how will his estate be distributed?

Kansas answer: B

Alice will inherit \$50,000 and Dave, Ed, Frank, Gail, and Hank will each inherit \$10,000.

4. Assume that George passes on, survived only by his grandchildren. How will his estate be distributed among his grandchildren?

Kansas answer: A

Carrie will inherit \$50,000 and Dave, Ed, Frank, Gail, and Hank will each inherit \$10,000.

5. The answers to the first four questions are different if Alice or Bob are survived by spouses.

Kansas answer: False

6. If George dies without a will, how will his estate be distributed if both Alice and Bob pass on before him under Kansas law?

Kansas answer: A

The grandchildren would all take the share of their deceased parents. Carrie will inherit \$50,000 and Dave, Ed, Frank, Gail, and Hank will each inherit \$10,000.

7. George's will can direct that if both of his children pass on before him, his grandchildren will share equally.

Kansas answer: True

8. If George's will leaves his property to the survivor of his two children, and Bob passes on before George, Bob's five children will be disinherited.

Kansas answer: True

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This publication is provided as a public service and is designed to acquaint you with certain legal issues and concerns. It is based upon the laws of Kansas. It is not designed as a substitute for legal advice, nor does it tell you everything you may need to know about this subject. Future changes in the law cannot be predicted, and statements in this publication are based solely on the laws in force on the date of publication.

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