

Preserving Culture and Building Legacy with Genice Lee

Introduction and Guest Welcome

Candace Dellacona: Welcome to the Sandwich Generation Survival Guide. I am your host, Candace Dellacona. I am delighted to welcome Genice Lee from Harvest Estate and Appraisals straight outta Texas. Welcome, Genice.

Genice Lee: Glad to be here. Thank you so much for having me.

Candace Dellacona: I am so excited to have you. We had such an interesting conversation and I wish that our listeners were on for that first conversation, but I'm gonna do my best to share with our listeners and all the folks out there.

Genice Lee's Background and Expertise

Candace Dellacona: How you impacted the way that I think about things like legacy.

So we're gonna get right into it, but I want everyone to know that you not only are the owner of Harvest Estate and Appraisals out of Texas, which by the way is nationwide. You're highly educated having, your undergrad degree from UDub, great state of Washington in Japan regional studies, and you are Alma Mater you and I share is American University in Washington DC and you have been certified by multiple organizations including being an accredited senior appraiser from the Smithsonian Resident Program, you're part of the Uniform Standards of Professional Appraisal Practice. You've appeared on PBS's television show, Antique Road Show's, sister Show, Chesapeake Collectible, and you are passionate about talking about preserving culture and building legacy.

So that's really what I would love to talk with you about today. So welcome, Genice. That is quite an intro, but you are quite, quite the expert, so we're so happy to have you here.

Genice Lee: Again, thank you. I'm glad to be here.

The Importance of Legacy and Stories

Genice Lee: And yes very passionate about legacy. How to transfer and pass these objects and the stories through families. In our prior discussion, we were talking about shows like the Antique Road Show and Chesapeake Collectibles and why people love those shows so much, I really believe goes beyond the object, but really it is the story that connects the families to the object. That really is what draws the viewers in and why people love to come on the show and talk. They love to share the stories from their family. I just flew back in from Maryland filming Chesapeake Collectibles newest season that'll air in the spring of next year. And I tell you, it was just fun. The stories and we even had someone on there who came in with one of those stories people love, that Goodwill find. She found an object at Goodwill for \$7 and it ended up being worth three to \$5,000. And so those are the stories that people just love.

Candace Dellacona: Absolutely.

Genice's Personal Journey into Appraising

Candace Dellacona: But I think, even before we get there, I wanted to talk to you about how you got into this sort of rarefied world of appraising valuables. So share with us your trajectory, how you got here.

Genice Lee: The space of valuation, which is really what the industry is. We're valuers, we assign value to objects. Started for me with a love of history and seeing things in my grandparents' home and having questions about them. And then as time went on, I became one of those people who loved that thrill of the hunt we were just talking about looking for that hidden treasure.

And my husband, with his very practical side said you keep buying things and our house is starting to look like a thrift store. Do you think you could figure out a way to turn that passion into a way to monetize it? And so I took that challenge up and started the classes at George Washington University in Washington, DC, a certification through them joining the American Society of Appraisers, getting accredited with them, taking classes with the Smithsonian. But I would say a switch that really flipped for me that I understood the struggles of my clients is when my own mother passed away being the executor of her estate. I had the skillset to do the inventorying and getting those objects for the closing of her estate, but I then understood the struggles of clients dealing with the dynamics in a family, whether it's a blended family, whether it's added to families from marriage stepchildren, new husbands you're trying to mourn the loss of a loved one well as the courts are telling you certain documents have to be presented to them in a timely fashion. You're dealing with companies, you're trying to close out accounts, and in the midst of all of that, it really hit home for me. Some of the additional struggles that my clients had. I had not seen those before, even though I was working with these same issues, but I was on the outside looking in, and so I really had a compassion for those clients that couldn't go back into a loved one's home because they were still grieving and they needed someone to help them with that. So that's really how my journey started.

Candace Dellacona: That is one of the things about any of us who have that sort of passion, right? Is that something impacts you personally and it changes your view of what maybe you were doing in the past or the way in which you were handling those objects in the past. I appreciate your perspective as both the professional and as the daughter.

Challenges in Estate Management

Candace Dellacona: So tell me, when you were going through the process of dealing with your mom's estate, what were the issues that came up for you from a personal perspective that you felt were sort of at odds from your role as finding economic value, if we should say. So more about the connection to the object.

Can you think of any specific example that came up for you when you were going through that process?

Genice Lee: I was fortunate in dealing with my mom's estate that she did all the things that you would hope that people do in preparing. I know one of the things that we talked about is that a lot of times people will prepare for a baby, right? Everyone's excited about that new life. There's the baby shower, there's establishing bank accounts and college funds. But a lot of times people shy away from having that much consideration in transferring to when they're not gonna be here or how their loved ones are going to deal with that. And so my mom had done a lot of the right things. She had a will, and she left the ledger of bank accounts and where to find information.

Added complexity to that scenario was that my mother had remarried, my father had passed away, and so I was now dealing with this blended family of a father who had his own children. And most things went smoothly. However, there was this one account where the paperwork somehow didn't get processed correctly. And I specifically remembered that my mother had requested the information from my younger sister and myself. so that threw a monkey wrench into now all of a sudden we're faced with a probate issue and having the correct paperwork and even sometimes having power of attorney can be challenged by a bank or an institution.

And so there were just a lot of dynamics that. Where it should have been smooth sailing because I had all of the documentation. I still needed to speak with a lawyer, and I'm glad that I had someone that I could go to and talk to about the challenges of getting her estate done. But for the most part, things went smoothly.

I, above everything wanted to honor her wishes, which she spelled out quite concisely in her will. As to who was to get what, how things were to be split, how she wanted things done. And I would say on a personal note, a very transparent note, one of the bigger hiccups was that my mother didn't want a funeral and my grandparents wanted her to have one. And so to stand up to them and say, no, we're not gonna have a funeral because I wanna honor her wishes. That's not what she wanted. But, the compromise The compromise was if you all want to have a memorial service that you want to plan, my sister and I will gladly show up and participate and be with our family. But we're gonna honor my mother's wishes not to have funeral.

Candace Dellacona: So obviously you're speaking my language, right? We're talking about documents and the logistics of preparation and you're so right. I think that in our culture we are more enthralled with birth and joy and things like that. Why wouldn't we? And death is something that is sad. It involves grief and the loss of somebody that you love.

So it's not surprising that a lot of people don't have the proper documents in place. And I'm so glad that your experience with your mom's estate was relatively seamless to that point. And, you bring up too having the complexity of a family where you have your mother who has remarried and wanting to be very conscious of the feelings of your mother's husband while still wanting to own, the motherhood piece and the daughterhood piece that you felt and a complexity with grandparents and all of that. And that's definitely something that a lot of clients struggle with.

Sentimental vs. Monetary Value

Candace Dellacona: So when it comes to the actual items that do not have an intrinsic economic value, that it is something else and it maybe isn't mentioned in the will. How do you talk to families about those items that would maybe preserve a cultural aspect of one's family or perhaps has served as a building of their legacy, or maybe it's valued in a way that it should be?

Can you talk a little bit about those items?

Genice Lee: Yeah, I would say that one of the things that I often get to tell people is just because it's old, does it make it valuable. That really the job of the appraiser is to report what the market says about the item. So when we're talking about, sentimental value versus monetary value what's important is that, back to what I said in the beginning, a lot of times it's the story. And so what I really encourage clients to do when they're looking at the personal property, or what I like to call passion assets is there's a reason that you collected these things, and a lot of times if you're able to convey to whomever you want to receive them, why it was so important for you to obtain that object or what was the story behind it when you purchased it or how you acquired it. In telling that story, you're able to convey its importance in the legacy of your family. So that becomes the most important thing to put a note on it. When people have children that don't want things, I say can you put a note on the object so that maybe a grandchild can have it in the future?

And if there aren't any grandchildren or any children, what about a niece or a nephew to convey why this object is so important in your family? And then another option is if you don't convey it that way, maybe you can convey it to a historic house or museum and people who can value the object for the story that it tells, or the insight it brings, now you're presenting it to a broader audience. So there are a lot of ways to preserve the legacy, of the object for the person.

Candace Dellacona: Yeah, I think you're right. As an attorney who has guided hundreds, maybe thousands at this point, of clients through an estate administration, if you will, what you did for your mom, where you inventory the bank accounts and you have the life insurance and you have the real estate.

These are tangible items that have an economic value. So in many ways, it's easier to marshal those assets and divide them according to what it says in the will. So passion objects, which I love, is that what you called it?

Genice Lee: Passion assets.

Candace Dellacona: Passion assets. I love that. And articulating in your own estate plan what those passion assets are. Why they have value, whether, historical, cultural, legacy for your own family seems incredibly important. Do you know why families overlook that if it seems to have such value to their family? What is it about things like that we don't as a culture address as often as we should?

Genice Lee: I think it's familiarity. You've grown up with it. It's, oh, that glass candy dish, though, it may have brought you joy as a child because grandma kept peppermints or wrapped candy. And when you came over you accessed it, you touched it, you handled it. To think that carnival glass has value and you're thinking, oh, I grew up with it. I always got to handle it, touch it. So it didn't seem anything off limits or unaccessible to you. And so we sometimes devalue those things that we can just casually handle versus maybe the piece of artwork that's hanging up on the wall that's out of reach. And so I am a firm believer of enjoying the objects that I have. And so not that maybe the chairs in my house are from the late 18 hundreds, but they may be a reproduction Victorian side chair that I like to sit down in and read a book. And someone comes in to my house and they see it and I said, oh, yeah, I have a seat. And they're thinking, oh that's an antique or my husband's record collection that we play a lot. We enjoy listening to it. There are some collectors that don't play the records and they're sealed as if they were purchased brand new, but I've been one that's liked to handle the objects that I own so that I can enjoy them and I like for other people to enjoy them as well.

Candace Dellacona: That makes so much sense to me. Where you're looking to the, I guess the right term is the reverence with which somebody treats an object, and that doesn't necessarily mean that because it's not hanging on the wall that it doesn't have value to a family. When you talk about those items like a candy dish or something that maybe all of the grandchildren have had access to over the course of their childhood and it's symbolic to what grandma was to them, how you help families negotiate the tricky situation when there's one object and a number of people have the emotional attachment to that object?

Genice Lee: Boy, that can be tricky. If you want it, you want it, you want it. I've seen families do things such as to draw, right? So person number one gets this pick and then in the next round they pick last. The value in doing an inventory of the items and understanding the values is it helps with that process so that if someone wants a painting hanging on the wall that's \$10,000 and someone else wants five records that are lower in value, they have the option to pick a number of objects to equal the value of that painting. And so it does help in equitable distribution. It may not soothe the savage beast of two or three people wanting the same object, but then there are also been caveats thrown in there that if they cannot come to an agreement that the piece has to be sold and the money distributed equally. So sometimes it behooves the children or the benefactors to, muscle up and behave correctly so that piece doesn't have to get sold off.

Candace Dellacona: Yeah. That is definitely an issue that comes up in my practice where sometimes those items that don't have a lot of economic value are not the objects that people fight over. That it's the, small, sentimental items that would otherwise, not really render much on the open market, really caused

the greatest amount of strife because of the connection to the object, the cultural connection, the legacy connection.

Preserving African American Artifacts

Candace Dellacona: What would you say in your travels, one of the things that you and I spoke about and I think is really important as a Black American and helping other Black American families identify and categorize and honor those artifacts in particular. I know that you have a lot of knowledge in this area. Can you share a little bit about that?

Genice Lee: I would say one of the more overlooked objects that tossed away is actually paperwork. I have had the privilege to appraise and help place archives with a number of institutions that are from African Americans that have been collected and passed down to what I call the keeper of the grail or the keeper of the object, that this is the one person in the family that the collector knew would take care of that item and maybe even gave some direction in storing it, keeping it, making sure that it didn't get thrown away. But if that's the one thing that I would share with families, all families, is that one of the things that is going on in the marketplace is uncovering stories that are untold.

Again, we're back to that theme of telling the story. Some of those stories we know at the national level like a Dr. King,

Candace Dellacona: Right.

Genice Lee: But at the community level and the local level, there are a lot of stories and a lot of various communities that are untold, that have impacted the history of this country that are being thrown away as people pass away because the family doesn't know that they should look through that paperwork to see if it connects them in some way to a national movement or a local movement that impacted the history nationally, and it gets thrown away.

And so one of the things that I find that I'm constantly trying to communicate to families is there an untold story here in paperwork? Was someone the first to pioneer something, the first to do something? There was a family that I worked with in Washington, DC where the husband was a first to attend the dental school in Georgetown. And his wife was more focused on settling the estate and have the paperwork. And so I really encouraged her, do you all have these documents? And they still had a lot of his documents and I said, you really should as a family, rally around, saving those documents. Maybe finding a place, an institution a historic house, a organization that might be interested in them. There are a number of ways that these documents A need to be stored. And I talk with clients about not too much heat, not too much moisture, so the proper storage containers where they need to be stored, how they need to be stored. Then I also talk with them about there are a number of ways to decide if you wanna donate it to an institution.

There are determining factors as to why you pick an institution. You wanna give thought to that, will they digitize it for you so that public has more access to it. And then also a lot of times, organizations such as folks who are producing for organizations like Netflix are doing research and uncovering these untold stories and turning them into movies. And so there is a desire to obtain this new, what we consider to be new information. Only because we are not aware of it. Though the family or a particular community may be very well aware of that history.

Candace Dellacona: It brings up the image of the candy dish, right? That it's familiar to everybody in the family that there's not a recognition that it could have some significance beyond the family. And so

bringing up something like paperwork and, perhaps a diploma representing somebody's accomplishment and finding out where that lies in history and why that's important.

So aside from those particular items, what other paperwork if that's very largely overlooked. What other paperwork work is helpful in providing the family with some historical context? Do you have any suggestions on what they should look out for?

Genice Lee: Hmm. Wow. Paperwork. Again, as folks are passing away if you're able to really pay attention to those stories. I can remember visiting my great-grandmother in Arkansas and she was just one of the funniest people to me at that age. This lively 83-year-old woman, and I was like 14 at the time. I just thought that she had a lot of spunk, a lot of energy. But just to listen to the stories that she had to share. And for those of you that have people that are older, to document it, to grab a tape recorder, get them on camera, get their story down, get it transcribed.

Save those photographs. I know one thing that happens often the African American community is that the image and knowing who the person was in the picture gets separated as that object moves around. And so unlike a painting that has a signature and a date, sometimes, not all of them do, but a lot of them do. It later helps us to identify and move it along and track the provenance, meaning the ownership of how it went from one person to the next person. A lot of times that gets lost in photographs, and so you just have this photo album with all these pictures and you're like, who are these people and what are their stories?

And so I know back in the day, people would write on the back of a picture. Now we have all of these fancy ways to scrapbook and preserve images in a good way to make those notations so that that information moves along with the object. And I think that that's the name of the game in all of these passion assets is to identify the object and try to make sure that pertinent information moves along with the object. And the best way to do that is an inventory. I mean, if there is one thing that I would encourage, or another thing that I would encourage families is the inventory. It can be used in so many ways. It can be time consuming, but once you do it one time, you can use that inventory, for example, to enter items into an Excel spreadsheet. You have the location where it is in the house. You have a condition, you can get the values on the object. You can add columns to say, this item is to go to this person or this institution, or this is what I wish to have happen to it, were something to happen to me. You can add things, take away things, and it's just a great way to track across multiple situations from insurance claims to moving to estate planning. I think the inventory is an invaluable tool for families. It takes time, but it's one of those, once you have it done, you can just modify on it and use it in multiple ways.

Candace Dellacona: I think you're right. I think having documentation not only provides those who are left behind a guide in terms of what they're looking for and why it perhaps should be preserved and should be sought after and sought out among all the things in a person's house or their apartment.

I also think, going back to family conflict. It is definitely a way if you can assign a person whom you think would appreciate the object it definitely provides extra guidance to someone who's administering an estate in terms of what the person's wishes are. Certain states like New York don't allow inventories to direct where assets go. It's gotta be in the actual will. But trusts actually do allow things like inventories. So it's really important to talk to the local attorney where you live, to find out if this is allowed, but it will serve as clear and convincing evidence as to what you would've wanted if there is some kind of conflict.

So I love that. Really practical advice, Genice. In terms of your role as a sandwich generation member, we're talking often here about surviving the sandwich generation, and not only surviving, but thriving. As you move through your career, I think we're contemporaries here. And we're trying to launch our humans that we have at home and simultaneously advocate for our elders. Has your perspective changed as

someone who provides value and guides families through legacy as you find yourself in the sandwich generation?

Genice Lee: I think understanding perhaps the generation behind me, which would be my 19-year-old,

Candace Dellacona: Yeah.

Genice Lee: trying to understand how she sees the world. I grew up, I came up with none of the technology. She's been raised with a lot of the technology and a lot more access to different opinions that come from around the world. So when we talk about, for example, the books behind us, those, that's my research library. And so I find she loves to read, which is great, and she will often resource the books of my library for projects at school because she herself is quite artistic in and of herself from drawing to character creation.

And so she will research the books because she loves the styles from the 1930s. And so she'll come and take the books off my shelf and look at the objects, the furniture, the clothes. And so it's quite amusing for me to hear vintage being the 1980s. I'm like, vintage is the 1980s? That is hilarious.

But when my mother was alive, to watch her interact with my mom. And when sometimes there were complaints about, oh, school or whatever, we all have complaints growing up. To encourage her to talk to my mom about did your grandmother love school? What was the difference for her? And again, to tap those stories, to bridge the gap between that generation so that she could understand what my mom valued and why education was so important to her and how different her life was for her versus what my daughter has access to. And then even myself, what I value in the space that I am in and why I love appraising, why I love the work, why I love legacy, why it's so important to share those stories between all the generations. And even though my daughter doesn't want any of these books behind me, I have definitely stressed the importance of the value of the books, just as I have clients that reach out to me that want to emphasize to their children the value of their art collections.

Candace Dellacona: Sure.

Genice Lee: For example, so that daughter doesn't give away a, a Mayhew piece that could be 10 to \$15,000 because they don't have an inventory or any instruction about the piece. Someone comes in and says, oh, you know, I always admired that piece of artwork that hung in your dining room, in your family of can I have it? And they go, sure. Yeah. Because they don't know the value. And so I think that's really where we pass along in this sandwich generation conveying values that are important to us. And me being in the middle at one point before my mother passed away sharing my values with my daughter and my mother, sharing her values with me and my daughter. And so just to convey the legacy of values or why we value an object has been important in my family.

The Role of Technology in Legacy Preservation

Candace Dellacona: I love that and also, the connection with your daughter as it relates to the younger generation in technology. I think for all of our kids, my kids, your daughter. I think it will be easier for them to preserve the legacy because there are so many technological advances that make it so convenient to do that.

If you think about our grandparents trying to find a way to record a voice or a story, it probably would've been a lot more difficult to do. But we all have phones in our pockets that have that capacity to capture voices and images and one of my favorite tools I'll tell you is just a shout out to Google, but Google Photos does an identification for faces.

If you can identify somebody in one picture and you were talking about, the lost art of writing on the back of a photograph and being able to scan in additional images, and maybe you'll find that person in other images as well, and using that technology to help you preserve that culture and the legacy and continue the story.

So I love that bringing in the next generation to complete our story.

Genice Lee: I'd love to piggyback on your comment about Google Photos and as an appraiser, one of the main things that we do is we have to identify the object, and so I definitely do not discourage people from using that feature in Google to grab the image of an object so that they can understand what it is.

A lot of times the question is what is this? And oftentimes, not all the time, but oftentimes it will give you the first step into understanding, oh, the item is this. Now, where I caution people is I say you don't necessarily wanna let Google be your appraiser,

Candace Dellacona: Fair.

Genice Lee: It will be with the first step of identifying the object. It may not convey the appropriate markets, depending on what's going on with the piece, but it will help you to identify what it is and then allow you to move forward from there. So I also do tell people, no, I don't have a problem with people, grabbing an image or using that technology. It's smart. It definitely lets them know, do I wanna pursue this any further or has my question been answered?

Candace Dellacona: I love that. And I think what it comes down to is you have to go to the expert and that's really where you come in, Genice.

Conclusion and Contact Information

Candace Dellacona: Where you really can come in and help families at a time, often when they're grieving and helping them sort through the noise to figure out, what is worth the effort of a family to preserve and what perhaps is better worth donating to someone who perhaps could use the object.

I know as an estate attorney, people like you are an invaluable resource to cut down on the time and sometimes you know the sadness as it relates to certain objects because it can provide insight as you say to something that you may not have known about that person when they were here.

So I love that you're so passionate about legacy building and the preservation of culture. And I just wanna remind everyone that although you are based in Texas, every time we talk, you are somewhere else. So I know you travel and you're an incredible resource to people across the country. And services like yours are really invaluable.

So I just wanna say thank you so much for spending some time with us and giving us your amazing insight.

Genice Lee: Thank you for having me, and I so appreciate that we share this heartbeat around legacy and families.

Candace Dellacona: Me too. Thanks again, Genice. And for all of those who are interested in learning more, I will have all of Genice's contact information in the show notes and thanks for tuning in everyone.

