



**PRESS RELEASE**  
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## **SB Museum of Natural History Hosts Free Online Workshop on Personal Property in Estate Planning**

- Plan While You Can, free online webinar Tuesday, March 30, 12:00 PM–1:00 PM
- Prepare for the challenge of distributing personal property with expert aid
- Register online at <https://sbnature.org/lg-workshop>

**SANTA BARBARA, CA**—The Santa Barbara Museum of Natural History is hosting a free, online lunch and learn workshop entitled “Plan While You Can: Strategize Your Personal Property in Estate Planning” on Tuesday, March 30, 2021 from noon to 1:00 PM.

Few families and individuals escape making decisions about passing on personal possessions. Determining who gets what can be a real challenge. What’s fair and equitable? What are the different distribution options, and what will the consequences be? What about the difference between value and worth?

This webinar will cover goals for transferring non-titled property, legal definitions and issues, bequest tips, and best practices to optimize your planning. Expert speakers Denise Stevens, M.A., and Elizabeth Stewart, Ph.D., will share personal stories from their experiences to help participants navigate this issue for themselves. Museum Legacy Giving Development Officer Rochelle Rose, CFRE, will moderate.

Denise Stevens is a former planned giving and financial professional who retired from a large healthcare nonprofit. She previously worked for various Fortune 500 companies including Wells Fargo, Bank of America, Transamerica, and Dean Witter. She earned double B.A. degrees from UCLA and a master’s degree in organizational behavior and development from California Lutheran University.

Dr. Elizabeth Stewart is 30-year expert in the world of material culture. She works as an appraiser of art and valuable personal property. A Certified Member of the Appraisers Association of America, she has spent a lifetime in the world of personal belongings, and in archives, libraries, and museum accession rooms.

Dr. Stewart holds a degree in history magna cum laude from Tufts University, an honors thesis in Architectural History from the University of Edinburgh, Scotland, and accomplished her internship at the Victoria and Albert Museum in London. She holds a master’s degree in historic preservation and public history from the University of San Diego, and a doctorate from Pacifica Graduate Institute in mythology.



For more information, contact Rochelle Rose at (805) 682-4711 x179 or [rrose@sbnature2.org](mailto:rrose@sbnature2.org). Register online at <https://sbnature.org/lg-workshop>.

### **About the Santa Barbara Museum of Natural History**

*Powered by Science. Inspired by Nature.* Founded in 1916, the Santa Barbara Museum of Natural History is a private, 501(c)3 nonprofit organization with a mission to inspire a thirst for discovery and a passion for the natural world. The Museum seeks to connect people to nature for the betterment of both, and prides itself on being *naturally different*. For more information, visit [sbnature.org](https://sbnature.org).