

Philanthropy's Role in Heirs' Property Solutions in Louisiana & the South

How Funders Can Help Secure Wealth and Land for Future Generations

March 20, 2025 at 11:00 am CT



AFN is the leading national grantmaker membership organization focused on advancing equitable wealth building and economic mobility.

- ✓ Broaden your Knowledge Base
- ✓ Connect to a Powerful National Network
- ✓ Amplify your Impact
- ✓ Collaborate for Influence



**Business
Ownership**

**Financial
Health**

**Employment
& Income**

Education

Health

Housing

**The Wealth
Gap**

Welcome from Victoria Adams Phipps, LA AFN Co-Chair



Victoria Adams Phipps,
JPMorgan Chase Global
Philanthropy, LA AFN
Co-Chair



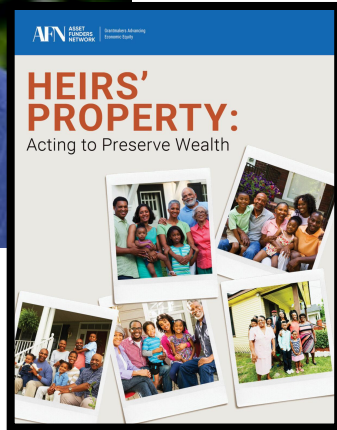
Tristi Charpentier,
Huey & Angelina Wilson
Foundation, LA AFN
Co-Chair



Grantmakers Advancing Economic Equity

Agenda

- 11:00 AM** Welcome and Agenda Setting, Brandon Rapp and Victoria Phipps
- 11:05 AM** Professor Mitchell: The Importance of Heirs' Property in the South and UHPHA
- 11:15 AM** Case Studies: Alexis Erkert, Southeast Louisiana Legal Services and Adrienne Wheeler, Louisiana Appleseed
- 11:30 AM** Dr. Karama Neal, Heirs' Property Funder Opportunities
- 11:37 AM** Peer-to-Peer Breakout
- 11:50 AM** Report Out
- Close Out, Next Steps, and Ways to Engage
- 12:00 PM** Adjourn



The Importance of Heirs' Property in the South and UHPHA

Professor Thomas Mitchell
Director - Initiative on Land,
Housing & Property Rights

Boston College Law School

Philanthropy's Role in Heirs' Property Solutions in Louisiana & the South



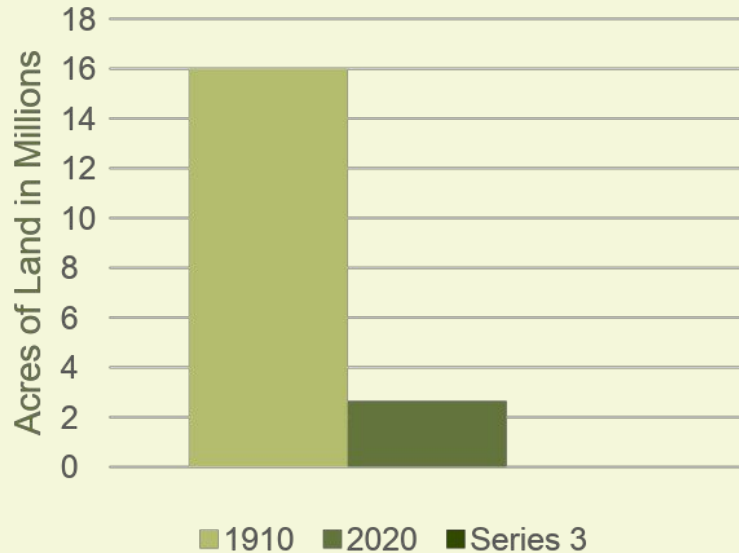
**LA Asset Funders Network Webinar
March 20, 2025**



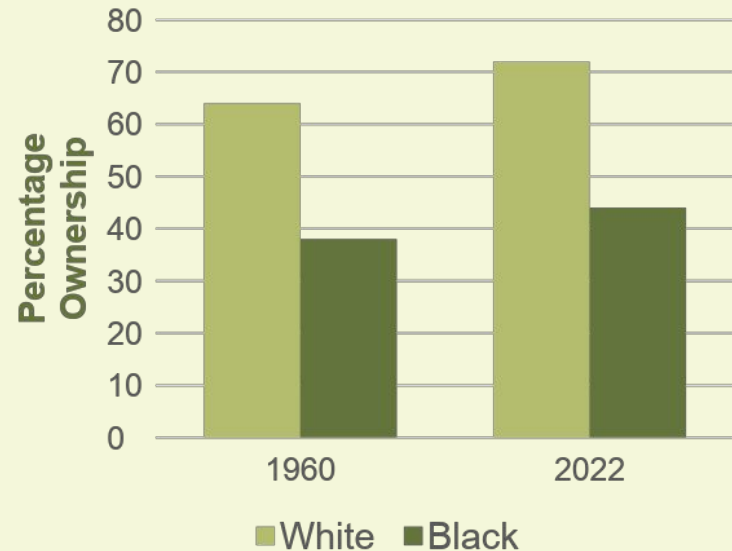
**Professor Thomas W. Mitchell, MacArthur Fellow,
Robert F. Drinan, S.J. Chair & Director,
Initiative on Land, Housing & Property Rights
Boston College Law School**

Dramatic Black Land Loss and Record Homeownership Gaps

Black Farmland Loss



Black-White Homeownership Rates



Heirs' Property Ownership Challenges

Negative Impacts

- ❑ Property Loss
- ❑ Gentrification
- ❑ Suboptimal Use and Management
- ❑ Cut off From Resources for:
 - ❑ Asset Preservation & Wealth Building
 - ❑ Neighborhood Decline
 - ❑ Increases Racial Wealth Gap

Unstable & Insecure Ownership

Vulnerable to court-ordered partition sales, property tax foreclosure sales, and other forced transfers because owners are “property rich and cash poor.”

“Gridlocked” Ownership

Problem with unanimity requirement undermining rational management and valuable uses, locking families into disfavored ownership structure

Lack of Clear Title/Tangled Title


Rendering owners ineligible to use their property to secure loans with commercial lenders or to participate in government programs

Boxed Out From Property Laws Designed To Make Ownership More Affordable
E.g., Homestead exemptions




Uniform Partition of Heirs Property Act: Hierarchy of Remedies

Pillar 1




Buyout Provisions
For Cotenants
Opposing Sale
Request

Pillar 2



Adds Substance
to Preference for
Partition in Kind:
Replaces
Economics-Only
Test with Totality
of Circumstances
Test

Pillar 3



Restructured
Sales Procedure
to Protect Family,
Generational
Wealth

Status Report on UPHPA

NATIONALLY

SAMPLE OF SELECTED STATES

- [Status of Enactment Efforts](#)



A.B.A. Book

- [Heirs' Property and the Uniform Partition of Heirs Property Act](#)

Case Studies: Local LA Stories



Alexis Erkert

Southeast Louisiana
Legal Services



Adrienne Wheeler

Louisiana Appleseed



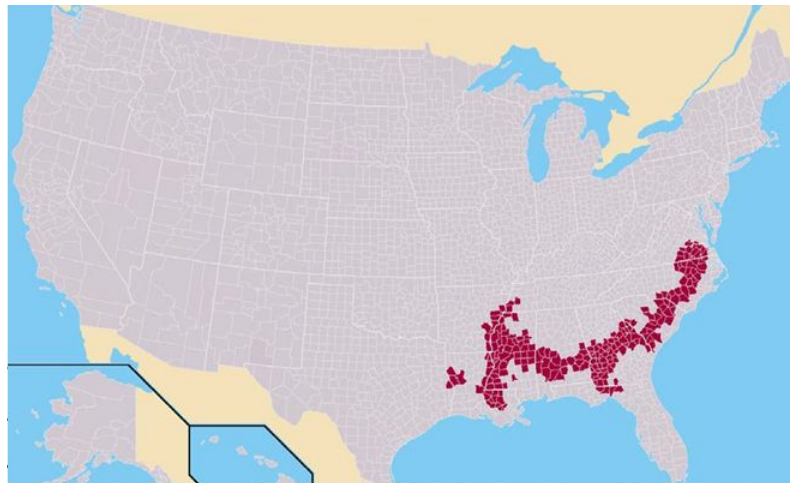
Karama Neal

**Strategic Project Director,
Heirs' Property
Asset Funders Network**

Heirs' Property in the South:

* “[T]he characteristics of places likely containing significant instances of tenancies in common—the Black Belt, central Appalachia, and eastern Oklahoma— display some commonalities, specifically economic stagnation resulting in generational poverty.”

* “[H]igh transaction costs involved with title clearance contribute to the perpetuation of tenancies in common in this subregion and elsewhere across the South.”



Heirs' Property in the Southern United States
https://www.srs.fs.usda.gov/pubs/gtr/gtr_srs216.pdf

Heirs' Property: Key opportunities for Grantmakers

- **Prevention, Management and Preservation:** Assist heirs' property owners with preserving and managing their property and with avoiding the generation of heirs' property.
- **Research and Public Education:** Increase awareness about heirs' property.
- **Policy and Advocacy:** Education about and promotion of reforms to help protect heirs and their property and to prevent the future proliferation of heirs' property.
- **Funder/Practitioner Convenings:** Aligning knowledge and activities.



Heirs' Property at Asset Funders Network: Recent/upcoming briefs

Heirs' Property: Acting to Preserve Wealth

- Funder-focused primer on heirs' property
- Fall 2023

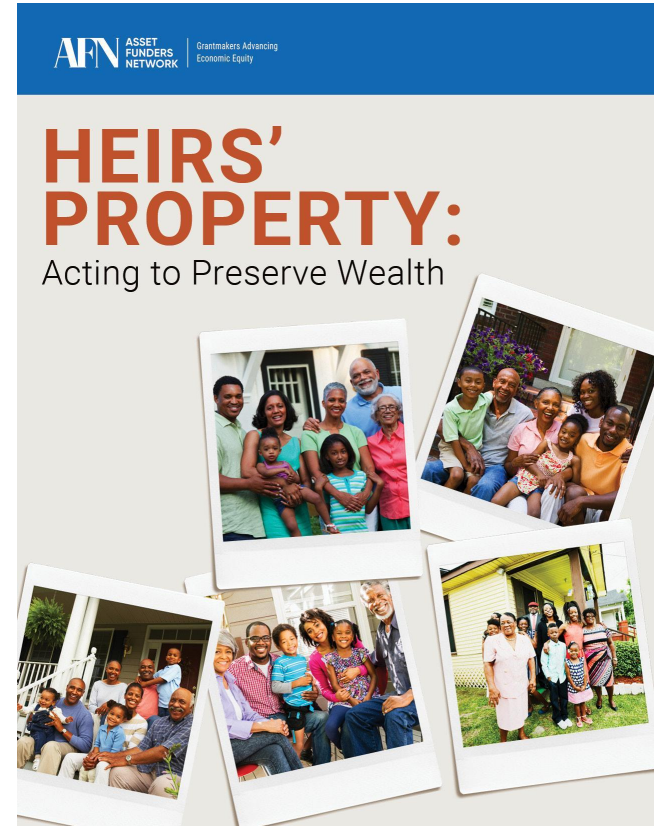
Heirs' Property: Policies to Preserve Wealth

- State policies for property preservation
- Fall 2024

Heirs' property: Investing to Preserve Wealth

- Prospective economic analysis of SROI
- Spring 2025

<https://assetfunders.org/?s=heirs+property>



Heirs' Property at AFN: Contact Information

Thank you!

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501-786-4156

Next: Breakout sessions

Breakout Sessions

AFN facilitators (10mins)

- Abby Hughes Holsclaw
- Carrie Coleman
- Kara Wilkins
- Dr. Karama Neal
- Brandon Rapp

Discussion Topics - we will include in the chat

Report Out

- **One major funding opportunity** or gap identified.
- **One key challenge** preventing more investment.
- **Any innovative ideas** for funding heirs' property work



Thank you

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<https://www.linkedin.com/in/rappb/>