Ethnicity and Inheritance

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Sociologists hold diverging views of the logic governing the acquisition and the transfer of wealth. Some researchers focus on material and objective factors, others on symbolic and subjective forces. When Marx, who represents the materialist position, argues that the value and the nature of assets shape both the conception that their owners have of the world, and more specifically, their definition of their domestic rights and obligations (cited in Newby, Bell, Rose, and Sanders, 1979, p. 24), he reminds us that market forces have an impact on wealth transfers. Differences in rates of returns on investments, risks incurred as a result of their acquisition or of their management, and rates of liquidity and transfer of specific kinds of assets condition choices made by individuals in building their estates as well as in disposing of them during or at the end of their lives.

A subjectivist perspective (Thompson, 1979) suggests that neither material nor symbolic objects have intrinsic value. Rather, their value is a mere social construct that individuals elaborate in order to justify and perpetuate their socioeconomic and/or cultural status. In this second perspective, the primary task of analysts consists of assessing how the ordering of assets mirrors and affects the ordering of eligible heirs. According to this perspective, sociologists should identify the role of inheritance as one of the mechanisms that social categories (gender, religious affiliation, social class, nationality, birth cohort) utilize in order to make and legitimate status claims.¹

Between these two perspectives, other social scientists posit the independence of the objective processes governing the acquisition of wealth and of the subjective processes regulating its intergenerational transfer. In a capitalist society, the acquisition of wealth is driven by rationality and the attempt to maximize profit. Yet wealth acquisition does not preclude the need for its legitimation through the use of significant, but "nonrational" symbols, to use here the very terms of Weber (1968). To reiterate Weber's own example, even though neighboring Polish and German farmers shared the same soil and, hence, the same opportunities or constraints, they have maintained distinct patterns of inheritance. Norms for deciding which share which eligible heir should receive, and when, vary with the culturally relative interpretations of opportunities and constraints, rights and duties.

Against this theoretical background, the purpose of this chapter is to assess the influence of ethnicity on the acquisition and the transfer of wealth in contemporary America. The amounts and kinds of economic capital available for transfers are affected by national origin. Yet the notions of national origin and of social class tend to overlap. Both the overall duration of the American experience acquired by various national groups and their prestige, relative to dominant groups of Anglo-American origin, condition the size of the share of the American "pie" claimed by each of these groups. Immigrant communities do not have equal access to the most rewarding educational opportunities or to the juiciest occupational or residential "plums." Furthermore, their economic progress varies (Lieberson, 1980). As an illustration, differences in the nature and the value of the assets owned by, say, the WASPs and the Vietnamese result from differences in the duration of their respective American experience. Moreover, the rank-ordering of national groups in terms of prestige operates independently of duration of experience, as illustrated by WASP and African-American differences in wealth, despite similarity of time of arrival in the New World.

Besides externally imposed conditions, such as economic opportunities and status rankings, wealth transfers are also conditioned by internal cultural differences among ethnic groups themselves. Such cultural differences include the nature of the assets preferred by individuals at various moments of their lives, their choice of a particular instrument of transfer, and the shares they assign to their heirs.

In view of the dearth of pertinent data, the first section of the chapter is devoted to pointing out the conditions under which ethnicity or national origin remains likely to influence the formation of individual wealth and its transfer to heirs in contemporary America. In the following sections of this chapter, I will assess the evidence pertaining to the impact of ethnicity and national origin on the composition of estates, the functions of wills, and on the mode of division of the estate.