



Will Probate Be Necessary on My Estate?

February 25, 2015

Resources

- **Probate in Montana** (MSU Extension MontGuide)
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199006HR.pdf>
Describes probate functions, types of estate administration, cost of probate and protections for surviving relatives.
- **Nonprobate Transfers** (MSU Extension MontGuide)
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199509HR.pdf>
Describes the various forms of ownership that allow the deceased's property to bypass probate and transfer directly to beneficiaries. Includes uniform single- or multiple-part account form.
- **Designating Beneficiaries Through Contractual Arrangements** (MSU Extension MontGuide)
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199901HR.pdf>
Learn about transferring your assets through contractual arrangements, such as those commonly found in insurance policies, IRAs, employee benefit plans, payable on death accounts and transfer on death accounts.
- **Accessing a Deceased Person's Financial Accounts** (MSU Extension MontGuide)
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT200301HR.pdf>
How to provide your children's physical and financial care in case of you or your spouse's death. Includes special instructions concerning handicapped and stepchildren.
- **Beneficiary Deeds in Montana** (MSU Extension MontGuide)
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT200707HR.pdf>
Beneficiary deeds allow owners of real property in Montana to transfer at death without probate their property to one or more beneficiaries.
- **State Law Library Forms:** www.montana.edu/estateplanning/eppublications.html
 - Application for Title of a Vehicle by Right of Survivorship
 - Affidavit for Collection of Personal Property of the Decedent
 - Acknowledgement of Fiduciary Relationship and Obligations Personal Representative, Guardian, or Conservator