



*Wildflower Reflections: Family Legacies  
and Estate Planning in Montana*

March 8, 2017

**Resources**

1. **Accessing a Deceased Person's Financial Accounts** (MSU Extension MontGuide)  
Describes how heirs of a deceased person can access his/her financial accounts, depending on whether the accounts were owned jointly with other individuals, had payable-on-death or transfer-on-death designations, or had no designated beneficiary.  
<http://msuextension.org/publications/FamilyFinancialManagement/MT200301HR.pdf>
  - a. **Affidavit for Collection of Personal Property**  
[www.montana.edu/estateplanning/documents/affidavitforcollectionofpersonalproperty.pdf](http://www.montana.edu/estateplanning/documents/affidavitforcollectionofpersonalproperty.pdf)
2. **Beneficiary Deeds in Montana** (MSU Extension MontGuide)  
Explains how Beneficiary deeds allow owners of real property in Montana to transfer their property to one or more beneficiaries without probate.  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT200707HR.pdf>
  - a. **Beneficiary Deed**  
[www.montana.edu/estateplanning/documents/beneficiarydeedform.pdf](http://www.montana.edu/estateplanning/documents/beneficiarydeedform.pdf)
  - b. **Revocation of Beneficiary Deed**  
[www.montana.edu/estateplanning/documents/revocationofbeneficiarydeedsampleform.pdf](http://www.montana.edu/estateplanning/documents/revocationofbeneficiarydeedsampleform.pdf)
  - c. **Affidavit of Death for Beneficiary Deed**  
[www.montana.edu/estateplanning/documents/affidavitofdeathdampleform.pdf](http://www.montana.edu/estateplanning/documents/affidavitofdeathdampleform.pdf)
3. **Designating Beneficiaries through Contractual Arrangements** (MSU Extension MontGuide)  
Focuses on transferring assets through contractual arrangements, such as those commonly found with insurance policies, IRAs and employee benefit plans.  
<http://msuextension.org/publications/FamilyFinancialManagement/MT199901HR.pdf>
4. **Dying Without a Will in Montana: Who Receives Your Property** (MSU Extension MontGuide)  
Includes legal terms and detailed examples of possible scenarios for distribution of property should a person die before writing a will.  
<http://msuextension.org/publications/FamilyFinancialManagement/MT198908HR.pdf>
5. **Dying Without a Will in Montana Website:**  
Who receives your property if you pass away without a written will? Use this website to discover how your property will be distributed under Montana law if you are a Montana resident and if you pass away without a written will (as do 7 out of 10 Americans).  
[www.montana.edu/dyingwithoutawill](http://www.montana.edu/dyingwithoutawill)

6. **Estate Planning: *Helping Montana have a say about what happens to property they have worked so hard to accumulate*** website  
[www.montana.edu/estateplanning](http://www.montana.edu/estateplanning)
7. **Life Insurance: An Estate Planning Tool** (MSU Extension MontGuide)  
Explains when life insurance should be part of a family's estate plan.  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199211HR.pdf>
8. **Nonprobate Transfers** (MSU Extension MontGuide)  
Describes the various forms of ownership that allow the deceased's property to bypass probate and transfer directly to beneficiaries.  
<http://msueextension.org/publications/FamilyFinancialManagement/MT199509HR.pdf>
9. **Property Ownership** (MSU Extension MontGuide)  
Describes the three main forms of property ownership, plus real-life examples of estate settlement for each.  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT198907HR.pdf>
10. **How to Transfer Property Owned in Joint Tenancy in a Life Estate Without Probate** (MSU Extension MontGuide)  
Describes the process when real property is owned as joint tenants or is subject to a life estate, the distribution method is determined by Montana Law.  
<http://store.msueextension.org/publications/FamilyFinancialManagement/mt201606HR.pdf>