



The Top 10 Estate Planning Actions for Montanans

1

Grant another person authority to make financial decisions for you with a Power of Attorney.

- [Power of Attorney](#): Explains how to give another person authority to make financial decisions for you through a legal document known as a power of attorney in case you become incapacitated.
 - [Power of Attorney Statutory Form](#)
 - [Agent Certification Statutory Form](#)



Date Accomplished: _____

2

Write a will to transfer your real property & financial accounts and a separate listing to transfer your non-titled property.

- [Wills](#): Outlines why and how to construct a will, including costs, restrictions and changes after its completion.
- [Who Gets Grandma's Yellow Pie Plate? Transferring Non-Titled Property](#): Explains how to deal with some of the issues that may arise with the transfer of non-titled property such as photographs and other family heirlooms among family members.



Date Accomplished: _____

3

Nominate a personal representative for your estate; also nominate a guardian and conservator for your minor children in your will.

- [Personal Representative Responsibilities](#): Explains Montana law covering the duties of a personal representative in settling an estate (often called 'executor' in other states).
- [Estate Planning for Minor and/or Special Needs Children](#): Explains how to provide for children's physical and financial care in case of parents death. Includes special instructions concerning special needs children and stepchildren.

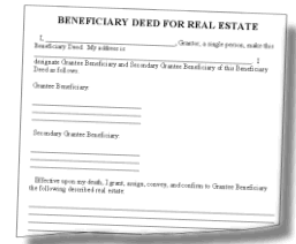


Date Accomplished: _____

4

Explore whether a Beneficiary Deed would meet your estate planning goals.

- [Beneficiary Deeds in Montana](#): Explains how Beneficiary deeds allow owners of real property in Montana to transfer their property to one or more beneficiaries without probate.
 - [Beneficiary Deed Form](#)
 - [Revocation of Beneficiary Deed](#)
 - [Affidavit of Death for Beneficiary Deed](#)



Date Accomplished: _____

5

Explore whether a Payable on Death Designation (POD) on your financial accounts and a Transfer on Death Registration (TOD) on security accounts would meet your estate planning goals.

- [Nonprobate Transfers](#): 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.



Date Accomplished: _____

6

Make a Declaration (living will).

- [Montana Rights of Terminally Ill Act](#): Describes how you (or someone selected by you) can choose to terminate your medical treatment, should you have an incurable and irreversible condition that would lead to death without treatment.
 - [Declaration \(Direct Physician to Withhold\)](#)
 - [Declaration \(Designating Another Individual To Make Decision\)](#)

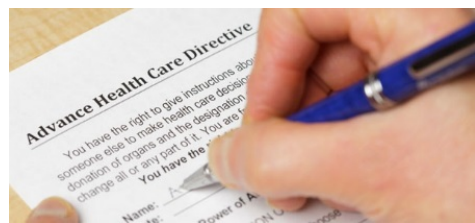


Date Accomplished: _____

7

Securely store your advance directives at the Montana End-of-Life Registry.

- [Montana End-of Life Registry](#): Answers commonly asked questions about the Montana End-of-Life Registry.
- [Consumer Registration Agreement Form](#): Explains how to deal with some of the issues that may arise with the transfer of non-titled property such as photographs and other family heirlooms among family members.
- [My Choices Advance Directive](#)



Date Accomplished: _____

8

Provide essential information in a Letter of Last Instruction.

- [Letter of Last Instructions](#): Explains what should be included in a letter of last instructions to assist survivors so they can find important papers and documents



Date Accomplished: _____

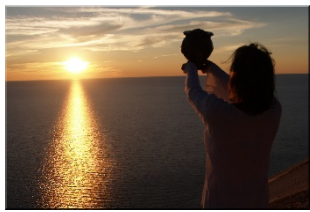
- [Your Important Papers: What to Keep and Where:](#) This guide offers a personalized and efficient system for preserving and safeguarding important family papers. Also provides a handy reference for deciding what items to keep.
- [Record of Important Papers \(eXtension\)](#) This interactive form is provided by eXtension in the Legally Secure Your Financial Future, a self-study curriculum, to help organize important papers, communicate wishes about legal and other issues, and prepare financial affairs.

Date Accomplished: _____

9

Provide instructions for disposing of your remains upon your death.

- [What Are Your Rights Over Your Remains?](#): The Montana Right of Disposition Act that allows a person to provide instructions for disposing of his or her remains or to designate an agent with authority to make such decisions.



Date Accomplished: _____

- [Cremation](#): Focuses on the option of cremation and explores personal and family concerns, state and federal regulations, and costs.

10

Decide if any of the following estate planning tools would be appropriate for your situation.

Read Date

- _____ ▪ [Life Insurance: An Estate Planning Tool](#)
- _____ ▪ [Life Estate: A Useful Estate Planning Tool](#)
- _____ ▪ [Long-Term Care Partnership Insurance in Montana](#)
- _____ ▪ [Annuities](#)
- _____ ▪ [Revocable Living Trusts](#)
- _____ ▪ [Montana Medical Care Savings Accounts \(MSAs\)](#)



Date Accomplished: _____

Notes:

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