Avoid Probate on your Home with a Beneficiary Deed

Date of Program:_________________   Group Name:_________________________
Number of participants:_________________

“Attention” Getter
• Assume Grandma has a $200,000 estate. What is the maximum Montana law would allow the attorney to probate the estate? Answer $6,600.

Talking Points
• Beneficiary Deeds are a way for people to transfer at death their real property (located in Montana) to one or more beneficiaries without probate.
• Beneficiary deed must be recorded before the death of the owner with clerk and recorder in the Montana County where the property is located.
• Beneficiary deeds must have the post office address of the grantee listed before the clerk and recorder’s office can record it.
• Owner must also fill out a Montana realty transfer certificate before the clerk and record will record a beneficiary deed.
• Cost for recording is $7 for standard form; $11 for non standard form.
• Point to the form in the MontGuide “Beneficiary Deeds in Montana” on page 4.

Teaching Tool
• If you have a small group and want to make flip charts on Beneficiary Deeds to www.montana.edu/extensionecon/presentations.html. Under estate planning click on Beneficiary Deeds.

Handout for Participants

Supplemental Materials
• Show an example of a Montana Realty Transfer Certificate
  ○ One can be obtained from your local Clerk and Recorder. Or, printed from the Web.

Evaluation Quickie (calculate percentages after the meeting and place on form)
• How many of you plan to record for a beneficiary deed?______________Percent______________
• How many of you plan to share information on beneficiary deeds with family & friends?___Percent___