Who Gets Your Property When You Die?

Date of Program:_________________   Group Name:_________________________

Number of participants:_________________

“Attention” Getter

- Ask question: What if you died on the way home today? Who would get your property?

Talking Points

- 7 out of 10 Montanans do not write a will
- If you die without a will Montana law determines who receives your property
- Priority is based on relationship of family survivor to decedent (person who died)
- Transfer is also affected by the way property is titled
  - For example, property titled in joint tenancy with right of survivorship passes to surviving the surviving joint tenants not by Montana’s intestacy statutes nor by a will
  - Financial accounts with POD (payable on death designation) and TOD transfer on death registration pass to beneficiaries not by Montana’s intestacy statutes nor by a will

Handouts for Participants

- Dying Without a Will business cards that provide the Interactive Web site address. Order from Keri Hayes by emailing khayes@montana.edu
- Estate planning bookmarks that provide the list of estate planning MontGuides available from MSU Extension. Order from Keri Hayes by emailing khayes@montana.edu

Supplemental Materials

- Dying Without a Will CD…show the audience what it looks like. Order from Keri Hayes by emailing khayes@montana.edu

Evaluation Quickie (calculate percentages after the meeting and place on form)

- How many of you plan to try out the Web site?_________________Percent_____________________
- How many of you plan to order the CD?_________________Percent_____________________
