

Estate/Legacy Planning for Parents and Grandparents Raising Minor Children



Saving More for your Children/Grandchildren: Avoiding Probate on Your Assets at Death

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Resources

1. **Transfer on Death Deeds in Montana** (MSU Extension MontGuide)

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A Transfer on Death Deed allows owners of real property in Montana to transfer it at death to one or more designated beneficiaries without probate.

- [Transfer on Death Deed Form--One Primary Beneficiary](#) (PDF)
- [Transfer on Death Deed Form--2 to 4 Beneficiaries](#) (PDF)
- [Affidavit of Death Form for Transfer on Death Deed](#) (PDF)
- [Revocation Form for a Transfer on Death Deed](#) (PDF)

2. **Nonprobate Transfers** (MSU Extension MontGuide)

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Describes the various forms of ownership Montana allows the deceased's property to bypass probate and transfer directly to beneficiaries such as payable on death designations on financial accounts and transfer on death registrations for stocks, bonds, and mutual funds.

3. **Transferring Real Property Owned in a Joint Tenancy or in a Life Estate Without Probate** (MSU Extension MontGuide)

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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.

- [Affidavit for Termination of Joint Tenancy Form](#) (Montana Department of Public Health and Human Services, Legal Developer Program, Aging Services Division) (PDF)