

Fabulous Fridays

What You Can Do With a Will and What You Can't

February 17, 2023

Resources

1. Wills

MSU Extension MontGuide

[\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)

Outlines why a written will is necessary. Includes information about costs, restrictions, and changes after its completion.

- a. [Acknowledgement of Fiduciary Relationship and Obligations Personal Representative, Guardian, or Conservator](#) (PDF)
- b. [Last Will and Testament-Single Individual Form](#) (Montana Department of Public Health and Human Services, Legal Developer Program, Aging Services Division) (PDF)
- c. [Last Will and Testament-Married Couple Forms](#) (Montana Department of Public Health and Human Services, Legal Developer Program, Aging Services Division) (PDF)

2. Letter of Last Instructions

MSU Extension MontGuide

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Explains what should be included in a letter of last instructions to assist survivors after the death of the writer.

- a. [Letter of Last Instructions Worksheet](#): (2022) A worksheet to fill in the necessary information to help prepare the Letter of Last Instructions that pertains to your situation. (PDF)

3. Estate Planning Tools for Owners of Pets & Companion Animals or Service Animals

(MSU Extension MontGuide)

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Outlines legal options for owners who plan to name a caregiver for their companion animals, service animals and/or pets in case of the owner's death or incapacitation.

4. AARP-Montana, Department of Public Health and Human Services, 2023 Kelly Moose Memorial Document In-Person Clinics

- a. Phone number: 1-800-332-2272

- b. Website with locations: <https://dphhs.mt.gov/assets/sltc/legaldeveloper/ClinicSchedule2023.pdf>

5. Montana Legal Developer Forms

<https://dphhs.mt.gov/sltc/aging/legalservicesdeveloper/disclaimer>

6. **Who Gets Grandma's Yellow Pie Plate? Transferring Non-Titled Property**

(MSU Extension MontGuide)

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Explains how to deal with some of the issues that may arise with the transfer of non-titled property such as photographs, jewelry, books, and other family heirlooms among family members.

For further information, visit the **Estate Planning website** at www.montana.edu/estateplanning.

This website provides current information about estate planning for Montanans who are interested in learning by attending webinars, in-person workshops, viewing MSU Extension MontGuides and other bulletins, and other information.