

Financial, Estate, and Health Care Planning Documents for Montanans Concerned about Memory Loss

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Resources

1. **Financial, Estate, and Health Care Planning Documents for Montanans Concerned About Memory Loss** (MSU Extension MontGuide)

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

All Montanans should plan for the future. For those who are concerned about memory loss, completing financial, estate and health care documents is even more important. Anyone could develop some form of dementia or experience a debilitating brain injury from a stroke or accident. These events have the potential to affect one's ability to remember, to reason, and to make decisions about finances, legacies, and health care treatments.

2. **Health Care Power of Attorney and Related Documents for Montanans**

(MSU Extension MontGuide)

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

This 24-page document explains a Health Care Power of Attorney for Montanans, and includes a worksheet and forms to appoint a health care agent(s) and assist others in understanding your health care preferences.

- [Health Care Power of Attorney Worksheet and Forms](#) (PDF) (2020)
- [“My Life, My Values” A Worksheet for Those Facing Memory Loss](#): The purpose of this worksheet is to provide you with the opportunity to record your thoughts about the activities you enjoy and hope to continue enjoying as long as is feasible. Hopefully, sharing the completed questionnaire with family members, friends and long-term care staff will open communication channels that will ensure maintaining the best possible quality of life. (PDF) (2021)

3. **Revocable Living Trusts.** (MSU Extension MontGuide)

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Defines and explains the benefits, shortfalls, and costs of living trusts.

4. **Testamentary Trusts in Montana** (MSU Extension MontGuide)

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A testamentary trust allows a trustee to manage assets on behalf of a beneficiary. A settlor is a person who creates a testamentary trust. The terms of the trust are set forth in the settlor's written Will. A testamentary trust does not legally exist until the settlor dies and the Will of the settlor passes through the probate process. This MontGuide answers questions Montanans have asked about testamentary trusts.

5. **MSU Extension Concerned About Memory Loss and Order Alzheimer Packet:**

<https://alzheimers.msuextension.org>

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