

A Series of 8 Estate/Legacy Planning Webinars

What's the Difference Between a Revocable Living Trust and Testamentary Trust?

November 5, 2021 Resources

- Using Trusts in an Estate Plan to Provide for Children from Blended Families MSU Extension MontGuide (MT202109HR) (2021) (PDF Version) (HTML Version-ADA Accessible) [Order Online] While estate planning is an important issue for Montana families, blended families bring unique challenges to the process. Testamentary and Clayton Election Qualified Terminable Interest Property (QTIP) trusts are alternatives to help blended families achieve a variety of estate planning goals.
- Revocable Living Trusts
 MSU Extension MontGuide (MT199612HR) (2019)
 (PDF Version) (HTML Version-ADA Accessible) [Order Online]
 Defines and explains the benefits, shortfalls, and costs of living trusts.
- Administering a Special Needs Trusts: A Handbook for Trustees (2021 Edition) Special Needs Alliance Attorneys for special needs planning <u>https://www.specialneedsalliance.org/wp-content/uploads/2021/03/SNA-2021-Handbook.pdf</u>
 - a. Order a free copy: https://www.specialneedsalliance.org/special-needs-101/free-trustee-handbook

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