

Wednesday Wisdom



Estate/Legacy Planning Insights

Is Your Will Worth the Paper It's Written On?

April 6, 2022 Resources

- Who Gets Grandma's Yellow Pie Plate? Transferring Non-Titled Property
 (MSU Extension MontGuide)
 (PDF Version) (HTML Version-ADA Accessible) [Order Online]
 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.
- 2. Who Gets Grandma's Yellow Pie Plate? (38-minute video, University of Minnesota) https://extension.umn.edu/transferring-non-titled-property/who-gets-grandmas-yellow-pie-platetm-video
- 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.

Forms:

- Acknowledgement of Fiduciary Relationship and Obligations Personal Representative, Guardian, or Conservator (PDF)
- <u>Last Will and Testament-Single Individual Form</u> (Montana Department of Public Health and Human Services, Legal Developer Program, Aging Services Division) (PDF)
- <u>Last Will and Testament-Married Couple Forms</u> (Montana Department of Public Health and Human Services, Legal Developer Program, Aging Services Division) (PDF)

Letter of Last Instructions. (MSU Extension MontGuide)
 (PDF Version) (HTML Version-ADA Accessible) [Order Online]
 Explains what should be included in a letter of last instructions to assist survivors after the death of the writer.

- <u>Letter of Last Instructions Worksheet</u> (2017) A worksheet to fill in the necessary information to help prepare the Letter of Last Instructions that pertains to your situation. (PDF)
- 5. **Montana Legal Developer Forms:** https://dphhs.mt.gov/sltc/aging/legalservicesdeveloper/disclaimer
- 6. Wills and Estate Planning Guide--Fillable Form (MSU Alumni Foundation)
- 7. <u>Bequest Language</u> (Using MSU Alumni Foundation as an Example)