

Wednesday Wisdom

Free Estate Planning and Healthy Living Webinar Series with
Montana State University Extension

Selecting an Attorney in Montana to Develop an Estate Plan or Administer an Estate

May 24, 2023

Resources

- 1. Selecting an Attorney in Montana to Develop an Estate Plan or Administer an Estate (Probate)**
(MSU Extension MontGuide)
[\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)
Describes a process for selecting an attorney to help Montanans develop an estate plan and/or administer an estate (probate).
- 2. Estate Planning in Montana: Getting Started.** (MSU Extension MontGuide)
[\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)
Explains how--and why---to arrange for the future distribution of your property in Montana.
- 3. Income Tax Impact While Selling, Gifting, or Leaving Property as an Inheritance** (MT202202HR) (2022) [\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)
Before reaching a decision to sell, give, or leave property as an inheritance, owners should become aware of the income tax concepts of basis and adjusted basis. Property owners should also know the difference between the stepped-up basis on inherited property and the carryover basis on property the owner gifts during lifetime. This MontGuide will expand on the above concepts and illustrate the potential tax consequences.
- 4. Montana ABLE Accounts: Achieving a Better Life Experience** (MT201809HR) (2021) [\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)
The Achieving a Better Life Experience (ABLE) Act was enacted by the Montana Legislature in response to the United States Congress passing an act by the same name. An ABLE account is a savings account allowing persons with disabilities to save money without losing their SSI or Medicaid benefits.
- 5. Avvo.com Compare Estate Planning Lawyers** <https://www.avvo.com>

6. **Martindale Hubbell Rating Services for Attorneys:** Lists education, areas of practice, and scoring systems based on ratings by other attorneys.
<https://www.martindale.com/areas-of-law/estate-planning-lawyers/montana/>
7. **Montana State Bar of Montana** (Find a Lawyer)
<http://205.209.45.153/iabar/AttorneyOnLineMontana.nsf/srch?OpenForm>
8. **The American College of Trust Estate Counsel** (National nonprofit association of attorneys & law professors chosen by the peers)
<https://www.actec.org>