Wildflower Reflections:
Families, Legacies, and Challenging Decisions

Presenter:
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Selecting an Attorney in Montana to Develop an Estate Plan or Administer an Estate (Probate)
Quitclaim Deeds in Montana
Transfer on Death Deeds in Montana
Health Care Power of Attorney and Related Documents for Montanans

Additional Websites
Concerned About Memory Loss:
Montana Resources:
https://alzheimers.msuextension.org
MSU Extension Family Economics
www.montana.edu/familyeconomics
Estate Planning for Montanans
www.montana.edu/estateplanning
Dying Without a Will in Montana
www.montana.edu/dyingwithoutawill

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www.montana.edu/estateplanning
### Part 1: Estate Planning Basics
2-hour Program Topics

- Dying Without a Will: Who Gets Your Property?
- How Property Title Affects Who Receives Your Property
- Montana’s 120-hour Survival Requirement
- Non-Probate Transfers
  - Payable on Death (POD)
    - Designations on bank & credit union accounts
  - Transfer on Death (TOD)
    - Registrations on stocks, bonds, & mutual funds
  - Transfer on Death Deeds on real property
  - Transfer on Death Deeds for motor vehicles and vessels
  - Beneficiary Designations on life insurance and retirement accounts

### Part 2: Wills, Trusts, Probate
2-hour Program Topics

- Decision about treatment of heirs Equally, Equitably or Fairly?
- Wills
- Separate listing of tangible personal property
- Testamentary Trusts
- Revocable Living Trusts
- Probate
- Personal Representatives
- Gifting
- Montana Endowment Tax Credit

### Part 3: Other 2-hour Program Topics

- Estate planning aspects of common law marriages
- Basis in assets after death
  - Stepped-up
  - Carry-over
- Federal estate tax
- Montana Medical Care Savings Accounts

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### Other Resources

- New and Revised MontGuides/Publications
- Dying Without a Will
- Different Webinar Series
- Upcoming Events
- Recent News

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![Mules Ear](image)

![Green Gentian](image)

![Heart Leaf Arnica](image)