

Saving and Investing

____ Montana ABLE Accounts: Achieving a Better Life Experience

____ Health Care Savings Accounts

____ Montana Medical Care Savings Accounts for Tax Year 2024

____ Track'n Your Savings Goals

____ Track'n Your Savings Goals Register (free)

Financial Management

____ Check Register Tracking System (free)

____ Using a Check Register to Track Your Expenses

____ Developing a Spending Plan

____ Helping Friends Cope with Financial Crisis

____ Schedule of Non-Monthly Living Expenses

____ Using a Homestead Declaration to Protect Your Home from Creditors

Marriage and Families

____ Blended Families: Making Financial Decisions

____ Lending Money to Family Members

____ Premarital Agreement Contracts in Montana: Financial and Legal Aspects

____ Talking with Aging Parents About Finances

Household Record-Keeping

____ Your Important Papers: What to Keep and Where

Ordering Information

Please send the correct payment by check with your order. If you are requesting "cost" resources please include shipping.

Make check payable to MSU Extension and return brochure back to:

MSU Extension
P.O. Box 172800
Bozeman, MT 59717
E-mail: khayes@montana.edu
Phone: (406) 994-3511

Be sure to fill out your name and address below:

Mail to:

NAME

MAILING ADDRESS

CITY

STATE

ZIP

Authors

These publications were authored by Marsha A. Goetting, Professor and Extension Family Economics Specialist, and other faculty members of MSU Extension and Department of Agricultural Economics and Economics.

To obtain more information contact: Marsha Goetting, MSU Extension Economics, P.O. Box 172800, Bozeman, MT 59717 or email: marsha.goetting@montana.edu.



Montana State University Extension is an ADA/EO/AA/Veteran's Preference Employer and Educational Outreach Provider.

Family Financial Management Publications



2024



MSU Extension has a variety of **free** educational publications. You may receive the information in one of four ways:

1. MontGuides can be downloaded free at: www.montana.edu/extensionecon/publications.html. Then click on the category to find each publication.
2. Order MontGuides on this brochure, and mail to address provided (using a check as payment).
3. Pick up publications at your local county Extension office, free of charge.
4. Fill out this brochure online at: <https://www.montana.edu/extensionecon/familyfinancialmanagementpublicatons.pdf> and return form back to address provided or email form to khayes@montana.edu



Credit Management

___ Credit Card Tracker

Estate Planning

___ Accessing a Deceased Person's Financial Accounts

___ Annuities as an Estate Planning Tool

___ Montana Body Donation Program: A Potential Component of an Estate Plan

___ Montana Common Law Marriage

___ Cremation

___ Designating Beneficiaries Through a Contractual Arrangements

___ Dying Without a Will in Montana: Who Recieves Your Property?

___ Estate Planning in Montana: Getting Started

___ Estate Planning for Families with Minor and/or Children with Special Needs

___ Estate Planning: The Basics packet (\$10.00 plus \$3.95 shipping for each packet)

___ Estate Planning Tools for Owners of Pets & Companion Animals or Service Animals

___ Fiduciary Access to Electronic Communications and Digital Assets

___ Financial, Estate, and Health Care Documents for Montanans Concerned About Memory Loss

___ Gifting: A Property Transfer Tool of Estate Planning

___ Glossary of Estate Planning Terms

___ Health Care Power of Attorney and Related Documents for Montanans

___ Income Tax Impact While Selling, Gifting, or Leaving Property as an Inheritance

___ Letter of Last Instructions

___ Life Estate: A Useful Estate Planning Tool

___ Life Insurance: An Estate Planning Tool

___ Livestock Brands in Montana: An Important Component of an Estate Plan

___ Long-Term Care Partnership in Montana

___ Managing Someone Else's Money: Help for Trustees under a Revocable Trust in Montana

___ Medicaid and Long-Term Care Costs

___ Montana's End-of-Life Registry

___ Save Montana Income Taxes with a Charitable Gift Annuity: A Legacy Qualifying for the Montana Endowment Tax Credit

___ Montana Rights of Terminally Ill Act

___ Montana Uniform Transfer to Minors Act (UTMA): Custodial Accounts for Children Under Age 21

___ Nonprobate Transfers

___ Personal Representative Responsibilities

___ Power of Attorney (Financial)

___ Probate in Montana

___ Property Ownership

___ Provider Orders for Life-Sustaining Treatment (POLST)

___ Quitclaim Deeds in Montana

___ Revocable Living Trusts

___ Selecting an Attorney in Montana to Develop an Estate Plan or Administer an Estate (Probate)

___ Selecting an Organizational Structure for your Business

___ Settling an Estate: What Do I Need to Know?

___ Testamentary Trusts in Montana

___ Transfer on Death Deeds in Montana

___ Transferring a Montana Vehicle After Death of an Owner

___ Transferring Real Property Owned in a Joint Tenancy or in a Life Estate Without Probate

___ Transferring Yoru Farm or Ranch to the Next Generation

___ Using Trusts in an Estate Plan to Provide for Children from Blended Families

___ What Are Your Rights Over Your Remains?

___ Who Gets Grandma's Yellow Pie Plate? Transferring Non-Titled Property

___ Wills

For more on Estate Planning,
visit the MSU Extension Estate
Planning website at:
www.montana.edu/estateplanning

