

December 11, 2020

MSU Extension Family Financial Management Publications

Notes:

1. All MontGuides are available free from County Extension Offices. To order MontGuides go to Extension Publications at: <https://store.msueextension.org>
2. Most Bulletins are available free. Others have a charge. Costs are noted.
3. **Reprint** means use present supplies and then order new publications.
4. **Revised** indicates substantial changes have been made. Be sure you have copies with the revised date. Discard old copies.
5. **Discontinued** means the publication should no longer be made available to the public because it contains dated material. Discard the publication unless otherwise noted.
6. Questions? Contact Marsha Goetting, MSU Extension Family Economics Specialist, 994-5695, goetting@montana.edu.

Title	Number	Date
CREDIT MANAGEMENT		
Credit Control-Free-Discontinued Not Available to Download- Discontinued	EB0021	Discontinued-Toss
Debt Free By ??-Discontinued Not Available to Download- Discontinued	Bulletin 2B1261	Discontinued-Toss
Credit Card Tracker: FREE Not Available to Download	EB-168	Order here
Pay Day Loans-Laws Protecting Montana Borrowers-Discontinued	MT200102HR	Discontinued-Toss
PowerPay Your Way Out of Debt www.creditsmarts.montana.edu/powerpay.html	Online Version only	
Rent-to-Own Contracts-Discontinued	MT199812HR	Discontinued-Toss
Selecting a Credit Card-Discontinued	MT199802HR	Discontinued-Toss

Title	Number	Date
ESTATE PLANNING		
Accessing a Deceased Person's Financial Accounts www.msuextension.org/publications/FamilyFinancialManagement/MT200301HR.pdf	MT200301HR	Revised February 2017
Annuities www.msuextension.org/publications/FamilyFinancialManagement/MT199213HR.pdf	MT199213HR	Revised November 2018
Beneficiary Deeds in Montana <i>Has been replaced by Transfer on Death Deeds, see below.</i>	MT200707HR	
Montana Body Donation Program: A Potential Component of an Estate Plan http://msuextension.org/publications/FamilyFinancialManagement/mt201804HR.pdf	MT201804HR	New March 2018
Using a Bypass Trust to Provide for Children from Remarried, Step, and Blended Families http://store.msuextension.org/publications/FamilyFinancialManagement/MT201407HR.pdf	MT201407HR	Revised November 2019
Montana Common Law Marriage and Estate Planning http://store.msuextension.org/publications/FamilyFinancialManagement/mt201408HR.pdf	MT201408HR	Revised November 2019
Cremation www.msuextension.org/publications/FamilyFinancialManagement/MT200201HR.pdf	MT200201HR	Revised November 2018
Custodial Accounts for Kids Under Age 21 (<i>See Montana Uniform Transfers to Minors Act (UTMA)</i>)		
Designating Beneficiaries Through Contractual Arrangements www.msuextension.org/publications/FamilyFinancialManagement/MT199901HR.pdf	MT199901HR	Revised October 2019
Dying Without a Will in Montana: Who Receives Your Property www.msuextension.org/publications/FamilyFinancialManagement/MT198908HR.pdf	MT198908HR	Revised November 2019
Estate Planning for Parents with Minor and/or Children with Special Needs www.msuextension.org/publications/FamilyFinancialManagement/MT199117HR.pdf	MT199117HR	Revised October 2020
Estate Planning in Montana: Getting Started http://store.msuextension.org/publications/FamilyFinancialManagement/MT199508HR.pdf	MT199508HR	Revised February 2017
Estate Planning Tools for Owners of Pets & Companion Animals or Service Animals http://msuextension.org/publications/FamilyFinancialManagement/mt201405HR.pdf	MT201405HR	New June 2019

Title	Number	Date
Financial, Estate, and Health Care Planning Documents for Montanans Concerned About Memory Loss https://store.msuetension.org/publications/FamilyFinancialManagement/MT202005HR.pdf	MT202005HR	New September 2020
Federal Estate Tax www.msuetension.org/publications/FamilyFinancialManagement/MT199104HR.pdf	MT199104HR	Revised August 2019
Gifting: A Property Transfer Tool of Estate Planning www.msuetension.org/publications/FamilyFinancialManagement/MT199105HR.pdf	MT199105HR	Revised November 2019
Glossary of Estate Planning Terms www.msuetension.org/publications/FamilyFinancialManagement/MT200202HR.pdf	MT200202HR	Revised December 2019
Health Care Power of Attorney and Related Documents for Montanans https://store.msuetension.org/publications/FamilyFinancialManagement/EB0231ADA.pdf	EB 0231	New April 2020
Letter of Last Instructions http://store.msuetension.org/publications/familyfinancialmanagement/mt198904hr.pdf	MT198904HR	Revised March 2017
Life Estates: A Useful Estate Planning Tool http://msuetension.org/publications/FamilyFinancialManagement/MT200510HR.pdf	MT200510HR	Revised July 2015
Life Insurance: An Estate Planning Tool www.msuetension.org/publications/FamilyFinancialManagement/MT199211HR.pdf	MT199211HR	Revised April 2018
Livestock Brands in Montana: An Important Component of an Estate Plan http://msuetension.org/publications/FamilyFinancialManagement/MT201805HR.pdf	MT201805HR	New March 2018
Long-Term Care Partnership Insurance in Montana www.msuetension.org/publications/FamilyFinancialManagement/MT201202HR.pdf	MT201202HR	Revised May 2018
Medicaid and Long-Term Care Costs www.msuetension.org/publications/FamilyFinancialManagement/MT199511HR.pdf	MT199511HR	Revised July 2018
Montana's End-of-Life Registry www.msuetension.org/publications/FamilyFinancialManagement/MT200602HR.pdf	MT200602HR	Revised September 2019
Save Montana Income Taxes with a Charitable Gift Annuity: A Legacy Qualifying for the Montana Endowment Tax Credit (METC) https://store.msuetension.org/publications/FamilyFinancialManagement/MT202012HR.pdf	MT201807HR	New September 2020

Title	Number	Date
Montana Rights of the Terminally Ill Act www.msuetension.org/publications/FamilyFinancialManagement/MT199202HR.pdf	MT199202HR	Revised August 2018
Montana Estate Taxes Not Available to Download- Discontinued	MT200105HR	Discontinued-toss Tax no longer exists
Montana Uniform Transfers to Minors Act (UTMA): Custodial Accounts for Children Under Age 21 www.msuetension.org/publications/FamilyFinancialManagement/MT199910HR.pdf	MT199910HR	Revised September 2016
Nonprobate Transfers www.msuetension.org/publications/FamilyFinancialManagement/MT199509HR.pdf	MT199509HR	Revised March 2017
Personal Representative Responsibilities www.msuetension.org/publications/FamilyFinancialManagement/MT199008HR.pdf	MT199008HR	Revised October 2019
Power of Attorney www.msuetension.org/publications/FamilyFinancialManagement/MT199001HR.pdf	MT199001HR	Revised November 2018
Probate in Montana www.msuetension.org/publications/FamilyFinancialManagement/MT199006HR.pdf	MT199006HR	Revised November 2019
Property Ownership www.msuetension.org/publications/FamilyFinancialManagement/MT198907HR.pdf	MT198907HR	Revised November 2019
Provider Orders for Life-Sustaining Treatment (POLST) www.msuetension.org/publications/FamilyFinancialManagement/MT201112HR.pdf	MT201112HR	Revised November 2020
Revocable Living Trusts www.msuetension.org/publications/FamilyFinancialManagement/MT199612HR.pdf	MT199612HR	Revised August 2019
Selecting an Organizational Structure for Your Business www.msuetension.org/publications/FamilyFinancialManagement/MT199708HR.pdf	MT199708HR	Revised February 2019
Settling an Estate: What Do I Need to Know www.msuetension.org/publications/FamilyFinancialManagement/MT201004HR.pdf	MT201004HR	Revised February 2017
Transfer on Death Deeds in Montana https://store.msuetension.org/publications/FamilyFinancialManagement/MT202010HR.pdf	MT202010HR	New September 2020

Title	Number	Date
Transferring a Montana Vehicle Title After the Death of the Owner http://store.msuextension.org/publications/FamilyFinancialManagement/mt201613HR.pdf	MT201613HR	New October 2016
Transferring Real Property Owned in a Joint Tenancy or in a Life Estate Without Probate http://store.msuextension.org/publications/FamilyFinancialManagement/mt201606HR.pdf	MT201606HR	New February 2016
Transferring Your Farm or Ranch to the Next Generation Through a QTIP Trust Discontinued-Toss	MT200508HR	Discontinued-Toss
Transferring Your Farm or Ranch to the Next Generation FREE www.msuextension.org/publications/FamilyFinancialManagement/EB0149.pdf	EB0149	Reprinted January 2016
What Are Your Rights Over Your Remains? www.msuextension.org/publications/FamilyFinancialManagement/MT200918HR.pdf	MT200918HR	Revised January 2017
Who Gets Grandma's Yellow Pie Plate? Transferring Non-Titled Property www.msuextension.org/publications/FamilyFinancialManagement/MT199701HR.pdf	MT199701HR	Revised March 2017
Wills www.msuextension.org/publications/FamilyFinancialManagement/MT198906HR.pdf	MT198906HR	Revised February 2017
Estate Planning: The Basics \$10.00 Not Available to Download-Packet Format	EB0144	Click here to order.
FINANCIAL CALCULATORS		
How a Financial Calculator Can Help You Make Decisions (<i>Texas Instruments Battery Operated BA-35</i>) FREE Not Available to Download- Discontinued	Bulletin 2B1347	Discontinued-Toss <i>The financial calculator with battery is no longer for sale</i>
Using a Financial Calculator to Make Financial Decisions (<i>Texas Instruments Solar Powered BA-35</i>) FREE Not Available to Download- Discontinued		Discontinued-Toss <i>The solar powered BA 35 is no longer for sale.</i>

Title	Number	Date
FINANCING EDUCATION		
Estimating the Amount to Save for College Discontinued Not Available to Download-Discontinued	MT199103HR	Discontinued-Toss
Financing a College Education Discontinued Not Available to Download-Discontinued	MT199102HR	Discontinued-Toss
FINANCIAL MANAGEMENT		
Check Register Tracking System \$1.00 Not Available to Download (Actual Check Register)	EB50	September 2002 Click here to order.
Developing a Spending Plan www.msuetension.org/publications/FamilyFinancialManagement/MT199703HR.pdf	MT199703HR	Revised July 2018
Financially Fit \$Me.00-Free Not Available to Download-Bulletin Format	Bulletin 1326	Discontinued-Use up present supplies
Helping Friends Cope with Financial Crisis www.msuetension.org/publications/FamilyFinancialManagement/MT200206HR.pdf	MT200206HR	Revised January 2019
Managing a Seasonal Income For Family Living Expenses Discontinued Not Available to Download-Discontinued	MT199110HR	Discontinued-Toss
Montana Families: Taking Control During a Financial Crisis Discontinued Not Available to Download-Discontinued	2B1342	Discontinued-Toss
Schedule of Non-Monthly Family Living Expenses www.msuetension.org/publications/FamilyFinancialManagement/MT198910HR.pdf	MT198910HR	Revised February 2017
Small Claims Court Discontinued Not Available to Download-Discontinued	MT199206HR	Discontinued-Toss
Using a Check Register to Track Your Expenses www.msuetension.org/publications/FamilyFinancialManagement/MT198703HR.pdf	MT198703HR	Revised October 2018
Using a Homestead Declaration to Protect Your Home from Creditors www.msuetension.org/publications/FamilyFinancialManagement/MT199815HR.pdf	MT199815HR	Revised June 2018

Title	Number	Date
What to Do When You Lose Your Job Discontinued Not Available to Download-Discontinued	MT199702HR	Discontinued-Toss
HOUSEHOLD RECORD-KEEPING		
Record of Important Papers Discontinued Not Available to Download-Bulletin Format	2C1241	Discontinued-Toss
Replacing Those VIPS (Very Important Papers) Discontinued	MT199513HR	Discontinued-Toss
Your Important Papers: What to Keep and Where www.msueextension.org/publications/FamilyFinancialManagement/MT199611HR.pdf	MT199611HR	Revised April 2017
MARRIAGE & FAMILIES		
Lending Money to Family Members www.msueextension.org/publications/FamilyFinancialManagement/MT199323HR.pdf	MT199323HR	Revised October 2018
Making Financial Decisions at Marriage Dissolution: A Montana Guide Not Available to Download- Discontinued	EB155	Discontinued -Toss
Montana Guide to the Legal and Financial Implications of Marriage Not Available to Download- Discontinued	MT199106HR	Discontinued-Toss
Premarital Agreement Contracts in Montana: Financial and Legal Aspects http://msueextension.org/publications/FamilyFinancialManagement/MT201212HR.pdf	MT201212HR	Revised March 2017
Remarried Families: Making Financial Decisions www.msueextension.org/publications/FamilyFinancialManagement/MT201211HR.pdf	MT201211HR	Revised March 2017
Should Both a Husband and Wife Work Away From Home- Discontinued	MT198902HR	Discontinued-Toss
Talking with Aging Parents about Finances www.msueextension.org/publications/FamilyFinancialManagement/MT199324HR.pdf	MT199324HR	Revised June 2017
RETIREMENT PLANNING		
Estimating the Amount to Save for Retirement Discontinued	MT198905HR	Discontinued-Toss
Individual Retirement Accounts Discontinued	MT199807HR	Discontinued-Toss

Title	Number	Date
Shopping for an Individual Retirement Account Discontinued	MT200207HR	Discontinued-Toss
Inheriting an IRA: Planning Techniques for Primary Beneficiaries Discontinued	MT200310HR	Discontinued-Toss
Inheriting an IRA: Planning Techniques for Successor Beneficiaries Discontinued	MT200311HR	Discontinued-Toss
Withdrawals from IRAs When the Owner is Between Age 59½ and 70½ and When the Owner Turns 70½ Discontinued	MT200309HR	Discontinued-Toss
Withdrawals from IRAs When the Owner is Under Age 59½ Discontinued	MT200308HR	Discontinued-Toss
SAVING & INVESTING		
Montana ABLÉ Accounts: Achieving a Better Life Experience http://msuextension.org/publications/FamilyFinancialManagement/mt201809HR.pdf	MT201809HR	New June 2018
First-Time Home Buyer Savings Accounts www.msuextension.org/publications/FamilyFinancialManagement/MT199918HR.pdf	MT199918HR	Revised August 2017
Health Care Savings Accounts (HSAs) www.msuextension.org/publications/FamilyFinancialManagement/MT200704HR.pdf	MT200704HR	Revised February 2019
Investing in Certificates of Deposit Not Available to Download- Discontinued	MT199801HR Discontinued	Discontinued-Toss
Investing in Savings Accounts Not Available to Download- Discontinued	MT198436HR Discontinued	Discontinued-Toss
Investment Alternatives for the Beginning Small Investor Not Available to Download- Discontinued	2P014 Discontinued	Discontinued-Toss
Montana Medical Care Savings Accounts for 2020 Tax Year www.msuextension.org/publications/FamilyFinancialManagement/mt199817HR.pdf	MT199817HR	Revised April 2020
Tips for the Beginning Investor Not Available to Download-Discontinued	MT198434HR	Discontinued-Toss
Track'n Your Savings Goals www.msuextension.org/publications/FamilyFinancialManagement/MT200303HR.pdf	MT200303HR	Revised February 2017

Title	Number	Date
Track'n Your Savings Register (Not available to download) <i>No Charge-State Residents</i> <i>\$2.00-Out of State Residents</i>	EB 164	Reprint April 2004 Click here to order.
HOME-BASED BUSINESS		
Home-Based Business, Is this for Me? Not Available to Download- Discontinued	EB4	Discontinued-Toss