

July 7, 2022

MSU Extension Family Financial Management Publications

Notes:

1. All MontGuides are available free from County Extension Offices. The links below take you to the MSU Extension Publications Store. From there you can download the HTML (Accessible) Version or the PDF version. To order MontGuides go to Extension Publications at: <https://store.msuextension.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 https://extension.usu.edu/powerpay	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	MT200301HR	Revised February 2017
Annuities	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Has been replaced by Transfer on Death Deeds, see below.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	MT201804HR	New March 2018
Montana Common Law Marriage and Estate Planning	MT201408HR	Revised November 2019
Cremation	MT200201HR	Revised November 2018
Custodial Accounts for Kids Under Age 21 <i>Has been replaced by Montana Uniform Transfers to Minors Act, see below.</i>		
Designating Beneficiaries Through Contractual Arrangements	MT199901HR	Revised October 2019
Dying Without a Will in Montana: Who Receives Your Property	MT198908HR	Revised November 2019
Estate Planning for Parents with Minor and/or Children with Special Needs	MT199117HR	Revised October 2020
Estate Planning in Montana: Getting Started	MT199508HR	Revised February 2017
Estate Planning Tools for Owners of Pets & Companion Animals or Service Animals	MT201405HR	New June 2019
Federal Estate Tax	MT199104HR	Revised August 2019
Financial, Estate, and Health Care Planning Documents for Montanans Concerned About Memory Loss	MT202005HR	New September 2020
Gifting: A Property Transfer Tool of Estate Planning	MT199105HR	Revised November 2019
Glossary of Estate Planning Terms	MT200202HR	Revised December 2019
Health Care Power of Attorney and Related Documents for Montanans	EB 0231	New April 2020
Income Tax Impact While Selling, Gifting, or Leaving Property as an Inheritance	MT202202HR	New January 2022
Letter of Last Instructions	MT198904HR	Revised March 2017

Title	Number	Date
Life Estate: A Useful Estate Planning Tool	MT200510HR	Revised April 2021
Life Insurance: An Estate Planning Tool	MT199211HR	Revised April 2018
Livestock Brands in Montana: An Important Component of an Estate Plan	MT201805HR	Revised December 2020
Long-Term Care Partnership Insurance in Montana	MT201202HR	Revised May 2018
Medicaid and Long-Term Care Costs	MT199511HR	Revised April 2021
Montana's End-of-Life Registry	MT200602HR	Revised September 2019
Save Montana Income Taxes with a Charitable Gift Annuity: A Legacy Qualifying for the Montana Endowment Tax Credit (METC)	MT201807HR	New September 2020
Montana Rights of the Terminally Ill Act	MT199202HR	Revised August 2018
Montana Estate Taxes Not Available to Download- Discontinued	MT200105HR	Discontinued-toss Tax no longer exits
Montana Uniform Transfers to Minors Act (UTMA): Custodial Accounts for Children Under Age 21	MT199910HR	Revised February 2021
Nonprobate Transfers	MT199509HR	Revised March 2017
Personal Representative Responsibilities	MT199008HR	Revised September 2021
Power of Attorney	MT199001HR	Revised November 2018
Probate in Montana	MT199006HR	Revised November 2019
Property Ownership	MT198907HR	Revised November 2019
Provider Orders for Life-Sustaining Treatment (POLST)	MT201112HR	Revised November 2020
Quitclaim Deeds in Montana	MT202102HR	New January 2021
Revocable Living Trusts	MT199612HR	Revised August 2019
Selecting an Attorney in Montana to Develop an Estate Plan or Administer an Estate (Probate)	MT20107HR	New May 2021

Title	Number	Date
Selecting an Organizational Structure for Your Business	MT199708HR	Revised February 2019
Settling an Estate: What Do I Need to Know	MT201004HR	Revised February 2017
Testamentary Trusts in Montana	MT20113HR	New December 2021
Transfer on Death Deeds in Montana	MT202010HR	New September 2020
Transferring a Montana Vehicle Title After the Death of the Owner	MT201613HR	New October 2016
Transferring Real Property Owned in a Joint Tenancy or in a Life Estate Without Probate	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	EB0149	Revised June 2022
Using Trusts in an Estate Plan to Provide for Children from Blended Families	MT202109HR	New July 2021
What Are Your Rights Over Your Remains?	MT200918HR	Revised January 2017
Who Gets Grandma's Yellow Pie Plate? Transferring Non-Titled Property	MT199701HR	Revised March 2017
Wills	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	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	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	MT198910HR	Revised February 2017
Small Claims Court Discontinued Not Available to Download-Discontinued	MT199206HR	Discontinued-Toss
Using a Check Register to Track Your Expenses	MT198703HR	Revised October 2018
Using a Homestead Declaration to Protect Your Home from Creditors	MT199815HR	Revised December 2021
What to Do When You Lose Your Job Discontinued Not Available to Download-Discontinued	MT199702HR	Discontinued-Toss

Title	Number	Date
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	MT199611HR	Revised April 2017
MARRIAGE & FAMILIES		
Lending Money to Family Members	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	MT201212HR	Revised March 2017
Remarried Families: Making Financial Decisions	MT201211HR	Revised March 2017
Should Both a Husband and Wife Work Away From Home- Discontinued	MT198902HR	Discontinued-Toss
Talking with Aging Parents About Finances	MT199324HR	Revised June 2017
RETIREMENT PLANNING		
Estimating the Amount to Save for Retirement Discontinued	MT198905HR	Discontinued-Toss
Individual Retirement Accounts Discontinued	MT199807HR	Discontinued-Toss
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

Title	Number	Date
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 ABLE Accounts: Achieving a Better Life Experience	MT201809HR	Revised March 2021
First-Time Home Buyer Savings Accounts	MT199918HR	Revised August 2017
Health Savings Accounts (HSAs)	MT200704HR	Revised September 2021
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 (MSAs) for the 2022–2023 Tax Years	MT199817HR	Revised June 2022
Tips for the Beginning Investor Not Available to Download-Discontinued	MT198434HR	Discontinued-Toss
Track'n Your Savings Goals	MT200303HR	Revised February 2017
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