



*Top 10 Estate Planning Actions for Montanans*

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**Resources**

1. **The Top 10 Estate Planning Actions for Montanans** (*cut out for Legacy Gift Jar*)  
[www.msuextension.org/eptraining/documents/toptenepfcsupdate.pdf](http://www.msuextension.org/eptraining/documents/toptenepfcsupdate.pdf)
2. **Power of Attorney** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT199001HR.pdf>
  - a. **Power of Attorney Form**  
[www.montana.edu/estateplanning/documents/powerofattorneyform.pdf](http://www.montana.edu/estateplanning/documents/powerofattorneyform.pdf)
  - b. **Agent Certification Statutory Form**  
[www.montana.edu/estateplanning/documents/agentcertificationpoa.pdf](http://www.montana.edu/estateplanning/documents/agentcertificationpoa.pdf)
3. **Wills** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT198906HR.pdf>
4. **Who Gets Grandma's Yellow Pie Plate? Transferring Non-Titled Property** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT199701HR.pdf>
5. **Personal Representative Responsibilities** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT199008HR.pdf>
6. **Estate Planning for Families with Minor and/or Special Needs Children** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT199117HR.pdf>
7. **Beneficiary Deeds in Montana** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT200707HR.pdf>
  - a. **Beneficiary Deed Form**  
[www.montana.edu/estateplanning/documents/beneficiarydeedform.pdf](http://www.montana.edu/estateplanning/documents/beneficiarydeedform.pdf)
  - b. **Revocation of Beneficiary Deed**  
[www.montana.edu/estateplanning/documents/revocationofbeneficiarydeedsampleform.pdf](http://www.montana.edu/estateplanning/documents/revocationofbeneficiarydeedsampleform.pdf)
  - c. **Affidavit of Death of Beneficiary Deed**  
[www.montana.edu/estateplanning/documents/affidavitofdeathdampleform.pdf](http://www.montana.edu/estateplanning/documents/affidavitofdeathdampleform.pdf)

8. **Nonprobate Transfers** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199509HR.pdf>
9. **Montana Rights of Terminally Ill Act** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199202HR.pdf>
10. **Montana's End-of-Life Registry** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT200602HR.pdf>
11. **Letter of Last Instructions** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT198904HR.pdf>
12. **Life Insurance: An Estate Planning Tool** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199211HR.pdf>
13. **Life Estate: A Useful Estate Planning Tool** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT200510HR.pdf>
14. **Long-Term Care Partnership Insurance in Montana** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT201202HR.pdf>
15. **Annuities** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199213HR.pdf>
16. **Revocable Living Trusts** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199612HR.pdf>
17. **Montana Medical Care Savings Accounts (MSAs)** (MSU Extension MontGuide)  
<http://store.msueextension.org/publications/FamilyFinancialManagement/MT199817HR.pdf>