
Using Montana Estate Planning Tools for Avoiding Probate

May 12, 2021

Resources

1. [Transfer on Death Deeds in Montana](#) (MT202010HR) (2020) [[Order Online](#)]
A Transfer on Death Deed allows owners of real property in Montana to transfer it at death to one or more designated beneficiaries without probate.
 - a. Transfer on Death Deed Form ([WORD](#)) ([PDF](#))
 - b. Affidavit of Death Form for Transfer on Death Deed ([WORD](#)) ([PDF](#))
 - c. Revocation Form for a Transfer on Death Deed ([WORD](#)) ([PDF](#))

2. [Nonprobate Transfers](#) (MT199509HR) (2017) [[Order Online](#)]
Describes the various forms of ownership Montana allows the deceased's property to bypass probate and transfer directly to beneficiaries such as payable on death designations on financial accounts and transfer on death registrations for stocks, bonds, and mutual funds.

3. [Personal Representative Responsibilities](#). (MT199008HR) (2019) [[Order Online](#)]
Explains Montana law covering personal representatives in settling estates (often called "executor" in other states).
 - a. Acknowledgement of Fiduciary Relationship and Obligations Personal Representative, Guardian, or Conservator ([WORD](#)) ([PDF](#))
 - b. [How to Administer a Small Estate](#) (WORD)

4. [Probate in Montana](#). (MT199006HR) (2019) [[Order Online](#)]
Provides guidelines and costs for the process of settling the estate of a deceased person.
 - a. [Application for Title of a Vehicle by Non-Probate Transfer](#) (PDF)
 - b. Affidavit for Collection of Personal Property ([WORD](#)) ([PDF](#))

