

Thoughtful Thursdays

Using Montana Estate/Legacy Planning Tools to Avoid Probate While Saving More Dollars for your Heirs

April 15, 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.
 - o Transfer on Death Deed Form ([WORD](#)) ([PDF](#))
 - o Affidavit of Death Form for Transfer on Death Deed ([WORD](#)) ([PDF](#))
 - o 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.