

Fabulous Fridays

Save More Money for Your Heirs By Avoiding Probate

February 3, 2023

Resources

1. Nonprobate Transfers

MSU Extension MontGuide

[\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)

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.

2. Transfer on Death Deeds in Montana

MSU Extension MontGuide

[\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)

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--One Primary Beneficiary](#) (PDF)
- b. [Transfer on Death Deed Form--2 to 4 Beneficiaries](#) (PDF)
- c. [Affidavit of Death Form for Transfer on Death Deed](#) (PDF)
- d. [Revocation Form for a Transfer on Death Deed](#) (PDF)

3. Transferring a Montana Vehicle Title After the Death of an Owner

MSU Extension MontGuide

[\(PDF Version\)](#) [\(HTML Version-ADA Accessible\)](#) [\[Order Online\]](#)

Describes how to transfer a Certificate of Title, also known as the title, for a motor vehicle to the deceased's legal heirs.

- a. [Application for Title of a Vehicle by Non-Probate Transfer](#) (Montana Vehicle Division) (PDF)
- b. [Beneficiary Designation for Vehicle or Vessel Title](#) (Montana Department of Justice) (PDF)

For further information, visit the **Estate Planning website** at www.montana.edu/estateplanning.

This website provides current information about estate planning for Montanans who are interested in learning by attending webinars, in-person workshops, viewing MSU Extension MontGuides and other bulletins, and other information.