

Accessing a Deceased Person's Financial Accounts

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Resources

1. **Accessing a Deceased Person's Financial Accounts.** (MSU Extension MontGuide)
([PDF Version](#)) ([HTML Version-ADA Accessible](#)) [[Order Online](#)]
Describes how heirs of a deceased person can access his/her financial accounts, depending on whether the accounts were owned jointly with other individuals, had payable-on-death or transfer-on-death designations, or had no designated beneficiary.
 - a. [Affidavit for Collection of Personal Property Form](#) (PDF) Revised March 2020
2. **Designating Beneficiaries through Contractual Arrangements.** (MSU Extension MontGuide)
([PDF Version](#)) ([HTML Version-ADA Accessible](#)) [[Order Online](#)]
Focuses on transferring assets through contractual arrangements, such as those commonly found with insurance policies, individual retirement accounts and employee benefit plans.
3. **Personal Representative Responsibilities.** (MSU Extension MontGuide)
([PDF Version](#)) ([HTML Version-ADA Accessible](#)) [[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](#) (PDF)
 - b. [How to Administer a Small Estate](#) (Montana Judicial Branch) (PDF)
4. **Probate in Montana.** (MSU Extension MontGuide)
([PDF Version](#)) ([HTML Version-ADA Accessible](#)) [[Order Online](#)]
Provides guidelines and costs for the process of settling the estate of a deceased person.

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