

Beneficiaries 101

April 14, 2020

Resources

1. **[Designating Beneficiaries through Contractual Arrangements.](#)** (MT199901HR) (2019) [[Order Online](#)]
Focuses on transferring assets through contractual arrangements, such as those commonly found with insurance policies, individual retirement accounts and employee benefit plans.
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. **[Probate in Montana.](#)** (MT199006HR) (2019) [[Order Online](#)]
Provides guidelines and costs for the process of settling the estate of a deceased person.
 - o [Application for Title of a Vehicle by Non-Probate Transfer](#) (PDF file)
 - o [Affidavit for Collection of Personal Property of the Decedent](#) (PDF)
 - o [Acknowledgement of Fiduciary Relationship and Obligations Personal Representative, Guardian, or Conservator](#) (PDF)
4. **[Life Insurance: An Estate Planning Tool.](#)** (MT199211HR) (2018) [[Order Online](#)]
Explains when life insurance should be part of a family's estate plan.