

Important Decisions and Tough Conversations

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Resources

1. [Top Ten Estate Planning Actions for Montanans](#)
2. [Estate Planning in Montana: Getting Started](#). (MT199508HR) (2017) [[Order Online](#)]
Explains how--and why---to arrange for the future distribution of your property in Montana.
3. [Talking With Aging Parents About Finances](#) (MT199324HR) (2017) [[Order Online](#)]
Gives advice for dealing diplomatically with family finance issues.
4. [Property Ownership](#). (MT198907HR) (2019) [[Order Online](#)]
Describes the three main forms of property ownership in Montana, plus real-life examples of estate settlement for each.
5. [Life Estate: A Useful Estate Planning Tool](#). (MT200510HR) (2015) [[Order Online](#)]
Explains how to allow someone to possess property during his/her lifetime before the estate passes on to another person or organization.
6. [Life Insurance: An Estate Planning Tool](#). (MT199211HR) (2018) [[Order Online](#)]
Explains when life insurance should be part of a family's estate plan.
7. [Letter of Last Instructions](#). (MT198904HR) (2017) [[Order Online](#)]
Explains what should be included in a letter of last instructions to assist survivors after the death of the writer.
 - o [Letter of Last Instructions Worksheet](#): (2017) A worksheet to fill in the necessary information to help prepare the Letter of Last Instructions that pertains to your situation. (WORD File)
8. [Estate Planning for Families with Minor and/or Special Needs Children](#). (MT199117HR) (2018) [[Order Online](#)]
Explains how to provide for children's physical and financial care in case of parents' death. Includes special instructions concerning special needs children and stepchildren.
 - o [Acknowledgement of Fiduciary Relationship and Obligations Personal Representative, Guardian, or Conservator](#) (PDF)
9. [Transferring Your Farm or Ranch to the Next Generation](#). (EB 149) (2016) [[Order Online](#)]
Includes sections on starting a conversation with family members who are in denial or reluctant to discuss the situation; how to pinpoint your own and family members' expectations; identifying what is important to each generation; and options for ownership. Several worksheets are included to help both parents and adult children identify their goals and expectations.