

Tuesday Tips

A Series of 45-Minute Estate and Legacy Planning Webinars

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What You Can and Cannot Do With a Will

January 5, 2021 Resources

- 1. <u>Wills</u>. (MT198906HR) (2017) [<u>Order Online</u>]
 - Outlines why a written will is necessary. Includes information about costs, restrictions and changes after its completion.
 - Acknowledgement of Fiduciary Relationship and Obligations Personal Representative, Guardian, or Conservator (WORD) (PDF)
 - Last Will and Testament-Single Individual Form (<u>WORD</u>) (Montana Legal Developer, Senior and Long Term Care, DPHHS)
 - Last Will and Testament-Married Couple Forms (<u>WORD</u>) (Montana Legal Developer, Senior and Long Term Care, DPHHS)
- 2. Legal forms (Wills) Legal Services Developer, Aging Services, Senior and Long Term Care
 - https://dphhs.mt.gov/sltc/aging/legalservicesdeveloper/disclaimer
- 3. Legacy Jar Containing 10 Legacy Planning Actions(PDF)
 - www.montana.edu/estateplanning/tuesdaytips/resources/2021/toptenep.pdf