



## *Avoid Probate on Real Property with a Beneficiary Deed*

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### Resources

- **Beneficiary Deeds in Montana** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT200707HR.pdf>  
Beneficiary deeds allow owners of real property in Montana to transfer at death without probate their property to one or more beneficiaries.
- **Beneficiary Deed Forms:** Beneficiary Deed, Revocation of Beneficiary Deed, Affidavit of Death for Beneficiary Deed  
[www.montana.edu/estateplanning/eppublications.html](http://www.montana.edu/estateplanning/eppublications.html)
- **Realty Transfer Certificate** (County Clerk and Recorder's Office)  
<https://revenue.mt.gov/Portals/9/property/forms/488RTC.pdf>  
The owner must also prepare a Montana realty transfer certificate before the clerk and recorder will record a beneficiary deed.
- **Property Ownership** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT198907HR.pdf>  
Describes the three main forms of property ownership and provides real-life examples of estate settlement for each of them.
- **Nonprobate Transfers** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT199509HR.pdf>  
Describes the various forms of ownership that allow the deceased's property to bypass probate and transfer directly to beneficiaries. Includes uniform single- or multiple-part account form.
- **Probate in Montana** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT199006HR.pdf>  
Describes probate functions, types of estate administration, cost of probate and protections for surviving relatives.
- **Medicaid and Long-Term Care Costs** (MSU Extension MontGuide)  
<http://store.msuextension.org/publications/FamilyFinancialManagement/MT199511HR.pdf>  
Outlines the legal and tax ramifications, as well as impacts on emotional and physical health, of financing long-term care.
- **DNRC Water Right Ownership Form 608**  
[www.dnrc.mt.gov/wrd/water\\_rts/wr\\_general\\_info/wrforms/608.PDF](http://www.dnrc.mt.gov/wrd/water_rts/wr_general_info/wrforms/608.PDF)  
If there are water rights associated with the Montana real property that is subject to the beneficiary deed, the owner should prepare and sign a DNRC Water Right Ownership (Form 608).