

Tuesday Tips: Legacy and Estate Planning Webinars

What is your legacy? How can you assure the “right” people receive your property when you are gone? Do you want to be in control of who receives your property when you’re gone? Or, do you want to let the Montana legislature decide who receives your property after you die?

AARP-Montana and MSU Extension are collaborating to offer Montanans answers to these questions and more during a 3-part webinar estate planning series called Tuesday Tips on September 15th, 22nd, and 29th. Grab a cup of coffee or tea and join us from 10:00 – 11:00 AM.

The presenter for the series is Marsha A. Goetting, a Professor and Extension Family Economics Specialist at Montana State University in Bozeman. During the past seven years she has presented over 500 educational sessions reaching over 15,000 Montanans with financial and estate planning information. She has received state, regional and national awards for her programs. Dr. Goetting is well known for her authorship of 44 MontGuides (fact sheets) in the estate planning area.

Those of you who have attended her “in-person” sessions know her enthusiasm for the topic. As one of the participants in the Spring Tuesday Tips series said, “She’s also an outstanding webinar presenter.” Tune in to see if you agree.

September 15, 2020 10:00 AM

Website Registration: <https://bit.ly/AARPMTEstatePlanning091520>

Surprise, Montana law determines who receives your property upon death.....even if you have a will! Yes, Really!

While everyone owns some type of property—saving accounts, stocks, mutual funds, automobiles or a home—many are unaware how the wording on accounts, titles, or deeds determines who receives them upon the owner’s death. When property title combines with Montana’s Law of Intestate Succession and a written will there can be surprises. Grab a cup of coffee or tea and join us at 10:00 AM for an online seminar to learn more from Dr. Marsha A. Goetting, MSU Extension Family Economics Specialist at Montana State University in Bozeman.

September 22, 2020 10:00 AM

Website Registration: <https://bit.ly/AARPMTEstatePlanning092220>

Estate Planning Designations that Avoid Probate

Many Montanans are unaware of tools made available by the Montana legislature that allow us to avoid probate on our assets after we pass away. Grab a cup of coffee or tea and join us at 10:00 AM for an online seminar to learn how PODs, TODs and TODDs allow Montanans to avoid a costly probate. The presenter is Dr. Marsha A. Goetting, MSU Extension Family Economics Specialist at Montana State University in Bozeman.

September 29, 2020 10:00 AM

Website Registration: <https://bit.ly/AARPMTEstatePlanning092920>

The Sometime “Curse” of Joint Tenancy with Right of Survivorship titles plus Powers of Attorney

What are some of the potential consequences of holding property in joint tenancy with family members and others when you write a will. During this online seminar presenter Dr. Marsha A. Goetting, MSU Extension Family Economics Specialist at Montana State University in Bozeman will enlighten and perhaps shock you with the facts about joint tenancy ownership. Grab a cup of coffee or tea and join us at 10:00 AM to learn more about joint tenancies... plus bonus topics about Montana’s financial and health care powers of attorney.