



Tuesday Tips

*A Series of 45-Minute Estate
and Legacy Planning Webinars*

Comparing Life Estates and Joint Tenancies as Estate and Legacy Planning Tools

January 19, 2021

Resources

1. **Life Estate: A Useful Estate Planning Tool.** ([PDF](#)) ([HTML](#)) ([Order Online](#))
(MT200510HR) (2015)
Explains how to allow someone to possess property during his/her lifetime before the estate passes on to another person or organization.
2. **Transferring Real Property Owned in a Joint Tenancy or in a Life Estate without Probate**
([PDF](#)) ([HTML](#)) ([Order Online](#)) (MT201606HR)
Describes the process when real property is owned as joint tenants or is subject to a life estate, the distribution method is determined by Montana Law.
3. [Affidavit to Terminate Joint Tenancy](#) (Montana Department of Health and Human Services)