Dying Without a Will in Montana

Program Description: The “Dying without a Will in Montana” MSU Extension program was developed with grant funds from the Western Risk Management Center at Washington State University. Because seven out of ten Americans die without a will, four educational methods were designed to explain consequences of the intestate succession statutes that provide for the distribution of real and personal property in Montana if a person dies without writing a will.

First, a MontGuide (four-page fact sheet) was developed. This has been traditional method of disseminating information for a wide range of topics for MSU Extension for several decades. The MontGuide can be downloaded from the Web or picked up at or mailed from any of the 50 county extension offices, the MSU Publication Distribution center, or from the MSU Extension Family Economics Specialist.

Second, during 2006-2009 estate planning educational sessions were presented in 173 locations by the MSU Extension Family Economics Specialist with an attendance of over 3,700 Montanans. The majority of the participants indicated that the topic of “what happens when you die without a will” was the most valuable.

Third, a “Dying without a Will” Website was developed that allows users to answer yes/no questions about their family situation (single or married, children from this marriage, previous marriage, grandchildren and so on). Once the user has answered all the questions a screen appears with family tree illustrations of the distribution of their assets. Also included were links to 33 additional MSU Extension estate planning MontGuides and an evaluation form that could be completed online. http://www.montana.edu/dyingwithoutawill. Fourth, because not all Montanans have access to a reliable and high speed Internet connection, the entire Website was modified to operate on a CD.

Marketing approaches to promote both the CD and Web site included newspaper articles in a variety of Montana media markets, The Montana Lawyer, and radio PSAs. From 2007 – 2009 approximately 900 CDs were distributed. Each contained an evaluation with a self-addressed stamped envelope.

Program Results: Evaluations revealed that participants have taken estate planning actions as a result utilizing the Website or CD. Below are highlights from the 62 surveys that were returned:

- On a 1 to 5 scale users ranked the usefulness of the Web and CD as 4.24.
- 95% of users were able to find their specific situation on the Web or CD. After learning about Montana laws:
  - 38% discussed a will with their family; 37% drafted a will for the first time; 22% revised their current will; and 25% contacted an attorney for assistance in executing a will. When asked with whom users intended to share the information: 58% said their spouse/partner; 49% indicated their children; 27% reported other family members; 29% said friends.