



## House Republican Staff Analysis

---

Bill: HF 609  
Committee: Judiciary  
Date: 3/21/2011  
Member: Rep. Hagenow  
Staff: Amanda Freel (1-5230)

---

### Summary

This bill is an update of the probate and trust codes.

---

### Summary of Action

- Subcommittee 3/1/2011
  - Committee 3/2/2011 (21-0)
  - Passed House 3/21/11 (99-0)
- 

### Section-by-Section Analysis

This bill is from the Bar Associations Probate and Trust Law section. Provisions make the process of disposing of assets at death the same whether it is by a will through Probate or via a revocable living trust.  
Section 1 and 2 Taxation of Retirement Plan Benefits State Inheritance Tax Exemption

Section 3 and 4 Spousal Elective Share Notice

Section 5 and 7 Support Allowances from Decedents Estates

Section 6 and 8 Estate Support Allowances to Decedent's Surviving Spouse and Minor Children

Section 9 Personal Representative's Right of Retainer

Section 10 Guardianship Proceedings

Section 11 Modification or Termination of Irrevocable Trusts

Section 12-19 Claims Against Revocable Trusts

Section 18 Trustee's Liability for Distributions

Sections 20 and 21 Support Allowances from Revocable Trusts and Surviving Spouse and Children

Section 22 Trustee's Accounting

Section 23 Limitation on Actions Against Trustee

Section 24 Trustee Liability for Partnership Interests