

Table of Contents

CHAPTER 1. INTRODUCTION AND PRELIMINARY MATTERS

A. INTRODUCTION

- § 1:3 Origin of difference between real and personal property
- § 1:5 Omnibus Probate Act

B. PRELIMINARY MATTERS

- § 1:6 Necessity of administration in court
- § 1:7 Informal administration of small estates
- § 1:10 Decedent's body and its interment—Funerals and monuments
- § 1:11 Cemeteries and burial lots
- § 1:12 Powers of executors and administrators before appointment
- § 1:13 Intermeddling—Executors de son tort
- § 1:14 Effect of death or incapacity of principal on powers of agent
- § 1:15 Money or property found on or near body of decedent

CHAPTER 2. PROBATE COURTS

A. ORGANIZATION AND PRACTICE

- § 2:1 Organization of the Massachusetts Probate Court system
- § 2:2 Petitions, citations, appearances and hearings
- § 2:3 Miscellaneous matters relating to probate procedure

B. JURISDICTION AND POWERS

- § 2:5 General statutory jurisdiction
- § 2:6 Jurisdiction sometimes exclusive and sometimes concurrent
- § 2:7 Power to approve compromises and arbitrations

C. PROBATE DECREES

- § 2:9 Nature and form of probate decrees
- § 2:11 When probate court decisions can be attacked in collateral proceedings
- § 2:13 Power of probate courts to revise their own decrees to correct errors

D. EQUITY JURISDICTION OF PROBATE COURTS

- § 2:14 Generally

- § 2:15 Instructions to executors and other fiduciaries in the performance of their duties
- § 2:16 Declaratory judgments

E. COSTS AND COUNSEL FEES

- § 2:17 Award of costs and expenses
- § 2:18 Award of compensation to attorneys and others for services rendered to estate

CHAPTER 3. PROBATING THE WILL

- § 3:05 Massachusetts Uniform Probate Code *[New]*
- § 3:1 Custody of wills and production in court
- § 3:2 Preparing and filing the petition for probate
- § 3:3 Notice to interested parties
- § 3:4 Procedure for probating the will—Uncontested cases
- § 3:5 Procedure for probating the will—Contested cases
- § 3:6 How to contest a will
- § 3:7 Grounds for contesting a will
- § 3:8 Parties to will contests
- § 3:9 Jury issues
- § 3:10 Codicils and other testamentary instruments
- § 3:11 Lost wills
- § 3:12 Compromises of wills

CHAPTER 4. APPOINTMENT OF EXECUTORS AND ADMINISTRATORS

- § 4:05 Massachusetts Uniform Probate Code *[New]*
- § 4:1 Who may be appointed executor
- § 4:2 Who is entitled to be appointed administrator
- § 4:3 Procedure for securing the appointment of an executor or administrator
- § 4:5 No original administration after 50 years

CHAPTER 5. THE BOND

- § 5:05 Massachusetts Uniform Probate Code *[New]*

CHAPTER 6. SPECIAL FORMS OF ADMINISTRATION

- § 6:05 Massachusetts Uniform Probate Code *[New]*
- § 6:2 Special administrators
- § 6:3 Administrators with the will annexed
- § 6:4 Temporary executors and temporary administrators with the will annexed
- § 6:5 Administrators de bonis non
- § 6:6 Public administrators

TABLE OF CONTENTS

**CHAPTER 7. DEATH, RESIGNATION, OR
REMOVAL OF EXECUTORS AND
ADMINISTRATORS**

- § 7:3 Removal
- § 7:4 Consequences of death, resignation or removal

CHAPTER 8. INTERSTATE PROBLEMS

- § 8:1 What law governs administration
- § 8:6 Procedure to enable foreign executors or administrators to collect assets in Massachusetts
- § 8:7 The Massachusetts rule for the settlement of estates of deceased nonresidents
- § 8:8 Powers of foreign fiduciaries

CHAPTER 9. ASSETS OF THE ESTATE

- § 9:1 Preparing the inventory
- § 9:3 Personal property, generally
- § 9:5 Gifts and other transfers made by decedents
- § 9:5.50 Securities registered in beneficiary form *[New]*
- § 9:6 Gifts causa mortis
- § 9:7 Joint bank accounts and other jointly held property
- § 9:8 Debts, claims, and rights of action
- § 9:9 Apportionment of income
- § 9:10 Real property
- § 9:11 Nominee trusts
- § 9:15 Digital assets *[New]*

**CHAPTER 10. ASSETS—ACTIONS FOR
CAUSING DEATH**

- § 10:2 The general negligence statute
- § 10:5 Time limit for bringing actions for death
- § 10:6 To whom damages are distributed
- § 10:7 Damages for death not assets of estate—Exceptions in certain cases
- § 10:8 What happens if wrongdoer dies

**CHAPTER 11. COLLECTION AND
MANAGEMENT OF THE ESTATE**

- § 11:1 Taking estate into possession
- § 11:3 Contracts and expenditures relating to estate
- § 11:4 Performance of contracts made by decedent
- § 11:7 Title to personal property
- § 11:9 Powers and duties in relation to real estate

**CHAPTER 12. SALES UNDER LICENSE OF
THE COURT**

- § 12:1 Real estate subject to sale

- § 12:4 Procedure—The petition and license
- § 12:5 The sale and transfer
- § 12:10 Sales by foreign executors or administrators
- § 12:11 Specific performance of agreement or other obligation to convey

CHAPTER 13. TAXES, GENERALLY

CHAPTER 14. MASSACHUSETTS ESTATE AND GENERATION-SKIPPING TAXES

- § 14:1 Massachusetts estate tax
- § 14:3 Apportionment

CHAPTER 15. FEDERAL ESTATE AND GENERATION-SKIPPING TAXES

- § 15:1 Federal estate tax
- § 15:2 Federal generation-skipping transfer tax

CHAPTER 16. INCOME TAXES

- § 16:2 Massachusetts income tax

CHAPTER 17. PAYMENT OF DEBTS AND CLAIMS

A. IN GENERAL

- § 17:2 Obligations created by decedent
- § 17:3 Claims for services rendered to decedent
- § 17:5 Doubtful and disputed claims
- § 17:7 Order of payment—Priority
- § 17:8 Property out of which debts should be paid

B. THE SPECIAL STATUTE OF LIMITATIONS

1. GENERALLY

- § 17:11 Generally
- § 17:12 Claims barred by special statute of limitations

2. EXCEPTIONS TO THE STATUTE

- § 17:13 Failure of suit for defect of form
- § 17:14 Relief in equity
- § 17:17 Claims not accruing within period of limitation
- § 17:19 Tort action recoverable from insurance proceeds

CHAPTER 18. INSOLVENT ESTATES

- § 18:1 Representing the estate insolvent

TABLE OF CONTENTS

**CHAPTER 19. ALLOWANCE TO SURVIVING
SPOUSE AND MINOR CHILDREN**

**CHAPTER 20. RIGHT TO WAIVE THE
PROVISIONS OF THE WILL**

§ 20:1 Nature of right to waive—Procedure

§ 20:2 Amount which can be claimed

Appendix D. Self-Proving Affidavits for Wills

Table of Laws and Rules

Table of Cases

Table of Contents

CHAPTER 21. STATUTORY DISTRIBUTIVE SHARE OF A SURVIVING SPOUSE IN THE INTESTATE PROPERTY OF A DECEASED SPOUSE

- § 21:1 Nature of the right
- § 21:3 Circumstances affecting the right—Conveyances in fraud of it, etc.

CHAPTER 22. DOWER

- § 22:1 Nature of the right
- § 22:4 Estates or interests subject to dower

CHAPTER 23. HOMESTEAD

- § 23:05 Introduction *[New]*
- § 23:1 Nature of the estate
- § 23:2 How the estate is created
- § 23:3 Multiple owners and trusts
- § 23:4 Effect of marriage, divorce, etc. *[New]*
- § 23:5 Mortgages and other loans *[New]*
- § 23:6 Termination *[New]*
- § 23:7 Proceeds of sale or insurance *[New]*
- § 23:8 Preexisting homesteads *[New]*
- § 23:9 Exceptions under the statute and bankruptcy *[New]*

CHAPTER 24. RULES OF INHERITANCE AND DESCENT

- § 24:05 Massachusetts Uniform Probate Code *[New]*
- § 24:1 In general—Heirs and next of kin
- § 24:2 The statutory rule of descent and distribution
- § 24:4 Taking by right of representation
- § 24:11 Forfeiture of inheritance for crime
- § 24:12 Children born out of wedlock
- § 24:13 Posthumous children
- § 24:14 Adopted children

CHAPTER 25. PAYMENT OF LEGACIES

- § 25:2 Right of legatee to renounce or disclaim a legacy
- § 25:3 Actions to recover legacies
- § 25:4 Interest on legacies
- § 25:7 Advancements and the ademption of money legacies

- § 25:9 Death of legatee before the testator
- § 25:11 Bequests of income or annuities
- § 25:12 Mode and sufficiency of payment

CHAPTER 26. DISTRIBUTION OF INTESTATE PROPERTY

- § 26:3 The decree for distribution

CHAPTER 27. ACTIONS BY AND AGAINST EXECUTORS AND ADMINISTRATORS

- § 27:1 In general
- § 27:2 Personal or representative capacity—Form of writ
- § 27:3 Miscellaneous matters relating to pleading and practice
- § 27:6 Limitation of actions
- § 27:8 Death of either party, or death or removal of the executor or administrator, pending suit

CHAPTER 28. SUITS ON PROBATE BONDS

- § 28:4 Suit for failure to file inventory or account or to account for all assets
- § 28:10 Judgment and damages

CHAPTER 29. PROBATE ACCOUNTS

- § 29:1 Duty to render an account
- § 29:2 Form of accounts
- § 29:6 Schedule B—The credit side of the account—In general
- § 29:10 Procedure on accounting, hearings, contests, decrees, etc.
- § 29:12 Notice or assent requirements in allowance of accounts
- § 29:13 Appointment of a guardian ad litem in the allowance of accounts
- § 29:14 Conclusiveness of a decree allowing an account
- § 29:15 Impeachment and reopening of accounts

CHAPTER 30. APPEALS IN PROBATE PROCEEDINGS

- § 30:1 Nature of probate appeals
- § 30:2 Who may appeal what
- § 30:4 Reservations and reports
- § 30:8 What is before the court in appellate proceedings
- § 30:10 Attitude of reviewing court toward the appeal
- § 30:11 Effect of appeal on decree appealed from

CHAPTER 31. PARTITION

- § 31:1 Who may have partition
- § 31:2 Probate courts and land court have concurrent exclusive jurisdiction [*Retitled*]
- § 31:3 What land may be included in the petition
- § 31:7 Hearing—Decree—Appointment of commissioners, etc.

TABLE OF CONTENTS

- § 31:9 Costs and expenses
- § 31:10 Equity jurisdiction—Appointment of receiver to collect rents, etc.
- § 31:12 Partition by sale
- § 31:13 Distribution of proceeds—Claims against individual shares
- § 31:15 Improvements made by individual cotenants
- § 31:16 Death of cotenant before or during partition proceedings
- § 31:17 Effect of partition
- § 31:18 Rights of strangers not parties to the proceedings

CHAPTER 32. SETTLEMENT OF ESTATES OF ABSENTEES

CHAPTER 33. WILLS

A. IN GENERAL

- § 33:4.50 Claims against estate planning attorneys by a decedent's beneficiaries or heirs [*New*]

B. FORMAL REQUISITES OF WILL

- § 33:6 Requirement of testamentary capacity
- § 33:7 Execution of will
- § 33:8 Self-proving of will
- § 33:10 Attesting witnesses—Minimum requirements
- § 33:11 Validity of devise or legacy to witness

C. ALTERATION AND REVOCATION OF WILL

- § 33:14 Revocation of will as result of subsequent change in circumstances

D. RELATED TESTAMENTARY DEVICES

- § 33:20 Holographic wills
- § 33:23 Transactions void as testamentary in character and in violation of the statute of wills

E. UNDUE INFLUENCE, FRAUD AND MISTAKE

- § 33:25 Burden of proof; definition and nature
- § 33:26 Persons exercising influence
- § 33:27.50 Tortious interference with expectancy of receiving gift or legacy [*New*]

F. FORM, CONTENTS AND CONSTRUCTION OF WILL

1. GENERALLY

- § 33:30 General rules of construction—Ascertainment of testator's intention
- § 33:31 Assumption of knowledge of terms used in will
- § 33:32 Construction of inconsistent clauses or provisions
- § 33:33 Admissibility of evidence to aid in construction of will
- § 33:34 Presumption to dispose of entire estate
- § 33:37 Description and subject matter of legacy
- § 33:38 Legacy or devise as absolute interest, fee simple or life estate

2. PARTICULAR CLAUSES

- § 33:45 Clauses forfeiting legacies for contests

3. LEGACIES AND DEVISES

(a) Generally

- § 33:48 Specific and general legacies and devises—Ademption
- § 33:49 Bequests of shares of stock
- § 33:51 Lapsed legacies and devises
- § 33:52 Vested and contingent interests

(b) Bequests to Groups

- § 33:56 Bequest to group preceded by life estate or otherwise delayed
- § 33:57 Bequests to “heirs,” “issue,” “children,” “legal” and “personal representative,” “family,” “relatives,” “next of kin,” “parent” and “descendants”
- § 33:58 Children and other issue of the testator not provided for in the will
- § 33:59 Per capita or per stirpes

(c) Gifts to Charities

- § 33:60 Gifts to charities, in general
- § 33:61 Cy pres doctrine
- § 33:62 Authority of attorney general

CHAPTER 33A. ILLEGAL CONDITIONS AND RESTRAINTS ON ALIENATION

- § 33A:1 Illegal and impossible conditions
- § 33A:3 Conditions in restraint of alienation
- § 33A:6 Postponed enjoyment and the doctrine of *Clafin v. Clafin*

CHAPTER 34. POWERS OF APPOINTMENT

- § 34:3 How powers may be exercised—Construction
- § 34:4 What words are sufficient to exercise a power

TABLE OF CONTENTS

- § 34:5 Failure to appoint or appointment void for some illegality—
 Doctrine of capture
- § 34:6 The appointment relates back to the instrument creating the
 power
- § 34:7 Exception—Appointed property as assets for creditors
- § 34:8 Release, extinguishment, or revocation of powers

CHAPTER 35. GUARDIANS AND CONSERVATORS

A. IN GENERAL

- § 35:1 Introduction
- § 35:2 Jurisdiction and venue
- § 35:3 Right to counsel and other protections

B. APPOINTMENT OF GUARDIANS OF MINORS

- § 35:4 Conditions for appointment
- § 35:5 Selection and who may serve
- § 35:6 Procedure for appointment

C. APPOINTMENT OF GUARDIANS OF INCAPACITATED PERSONS

- § 35:7 Basis for appointment
- § 35:8 Selection and who may serve
- § 35:9 Procedure for appointment

D. APPOINTMENT OF CONSERVATORS

- § 35:10 Basis for appointment
- § 35:11 Selection and who may serve
- § 35:12 Procedure for appointment

E. TEMPORARY GUARDIANS AND CONSERVATORS

- § 35:13 Temporary and special guardians
- § 35:14 Temporary and special conservators

F. POWERS AND DUTIES OF GUARDIANS AND CONSERVATORS

- § 35:15 Requirement of giving bond
- § 35:16 Powers and duties of guardians of minors and incapacitated
 persons
- § 35:17 Powers and duties of conservators
- § 35:18 Support of a minor or other protected person
- § 35:19 Estate planning for a protected person
- § 35:20 Sales and transfers of real and personal property by
 conservator
- § 35:21 Sales of real estate where seller's spouse is under disability

- § 35:22 Contracts made by the conservator or the protected person
- § 35:23 Remedy of incapacitated or protected person where guardian or conservator refuses to act in the person's interests

G. FOREIGN GUARDIANS, CONSERVATORS, AND PROTECTED PERSONS

- § 35:24 Foreign guardians and conservators
- § 35:25 Conservators of nonresidents
- § 35:25.50 Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act *[New]*

H. INVENTORY AND ACCOUNTING; COMPENSATION

- § 35:26 Inventory and appraisal
- § 35:27 Accounts
- § 35:28 Compensation and expenses

I. RESIGNATION, REMOVAL AND TERMINATION OF GUARDIANSHIP OR CONSERVATORSHIP

- § 35:29 In general
- § 35:30 Resignation and removal
- § 35:31 Effect of termination

J. ACTIONS BY AND AGAINST GUARDIANS, CONSERVATORS AND PROTECTED PERSONS

- § 35:32 Actions by or against protected persons
- § 35:33 Actions against guardians and conservators

K. GUARDIANS AD LITEM AND NEXT FRIENDS

- § 35:34 Appointment, powers and duties of guardian ad litem or next friend
- § 35:35 Determination of expenses
- § 35:36 Distinction between guardian ad litem and next friend

L. ADDITIONAL OR ALTERNATIVE MECHANISMS FOR ADDRESSING MINORITY AND INCAPACITY

- § 35:37 Delegation of parental or guardianship authority
- § 35:38 Durable powers of attorney
- § 35:39 Health care proxies
- § 35:40 Uniform Transfers to Minors Act
- § 35:41 MUPC facility-of-payment provision
- § 35:42 Bank deposits made by or for minors

Table of Laws and Rules

Table of Cases

Table of Contents

CHAPTER 36. TRUSTS AND TRUSTEES

A. IN GENERAL

- § 36:1 Introductory scope note
- § 36:2 Creation and validity of trusts; rescission
- § 36:3 Amendment of trust
- § 36:4 Pour over trusts

B. APPOINTMENT OF THE TRUSTEE AND FUNDING OF THE TRUST

- § 36:5 The nature of the office
- § 36:7 How and when trustees are appointed
- § 36:8 Procedure for securing the appointment
- § 36:12 The nature of the trustee's title

C. TRUST ADMINISTRATION

- § 36:17 Investments by trustees
- § 36:19 Taxation of trust property
- § 36:20 Compensation—Reimbursement for expenses
- § 36:21 Death, resignation or removal

D. POWERS OF TRUSTEES

- § 36:23.50 Power to make decanting distributions *[New]*
- § 36:27 Power to make contracts

E. OBLIGATIONS AND LIABILITIES OF TRUSTEES

- § 36:28 Duty of good faith and loyalty
- § 36:29 Duty of reasonable skill and diligence
- § 36:30 Duty to act personally and not delegate
- § 36:32 Liabilities of trustees

F. TERMINATION, ACCOUNTING AND DISTRIBUTION

- § 36:33 Termination of trusts
- § 36:35 Keeping and rendering accounts
- § 36:38 Rights of the beneficiary

CHAPTER 37. CAPITAL AND INCOME PROBLEMS

A. IN GENERAL

- § 37:1 Generally
- § 37:2 What constitutes the principal of the trust fund—
Apportionment
- § 37:4 What constitutes income to the life tenant
- § 37:4.50 Power to adjust between income and principal [*New*]

B. PARTICULAR ITEMS

- § 37:5 Gains and losses, generally
- § 37:6 Ordinary cash dividends
- § 37:7 Stock dividends and other extraordinary dividends—Rights
- § 37:8 Rents, interest, and other income
- § 37:9 Bond interest—Amortization of premiums and accumulation
of discounts
- § 37:9.50 Assets of diminishing value [*New*]
- § 37:9.70 Derivatives and asset-backed securities [*New*]

C. PAYMENTS AND EXPENSES

- § 37:10 Generally
- § 37:11 Alterations and repairs
- § 37:12 Taxes, insurance, and interest

D. MISCELLANEOUS PROBLEMS

- § 37:13 Vacant and unimproved land
- § 37:14 Apportionment of proceeds of salvaging operations, mortgage
foreclosures, and delayed recoveries, generally

CHAPTER 38. REVOCABLE TRUSTS

- § 38:1 Nature of the problem
- § 38:4 What constitutes a valid revocation
- § 38:5 What transactions are void as being testamentary

CHAPTER 39. DISCRETIONARY POWERS OF TRUSTEES

- § 39:2 The general rule
- § 39:3 How far the court will guide the trustee
- § 39:4 When the court will interfere
- § 39:7 Discretionary power to decide between capital and income

TABLE OF CONTENTS

CHAPTER 40. SUCCESSIVE FIDUCIARIES

CHAPTER 42. MODIFICATION OF TRUSTS
[New]

§ 42:1 Introduction *[New]*

§ 42:2 Grounds for modification *[New]*

§ 42:3 Effectiveness of modification for federal tax purposes *[New]*

§ 42:4 Justiciability and procedural considerations *[New]*

§ 42:5 The Massachusetts *Bosch* cases *[New]*

Appendix

Appendix A1. Cumulative Table of Parallel References

Table of Laws and Rules

Table of Cases

Index