

FIRST REGULAR SESSION
HOUSE COMMITTEE SUBSTITUTE FOR
HOUSE BILL NO. 176
103RD GENERAL ASSEMBLY

0150H.02C

JOSEPH ENGLER, Chief Clerk

AN ACT

To repeal sections 456.1-108 and 456.10-1005, RSMo, and to enact in lieu thereof sixteen new sections relating to estate planning.

Be it enacted by the General Assembly of the state of Missouri, as follows:

Section A. Sections 456.1-108 and 456.10-1005, RSMo, are repealed and sixteen new
2 sections enacted in lieu thereof, to be known as sections 456.1-108, 456.10-1005, 474.540,
3 474.542, 474.544, 474.546, 474.548, 474.550, 474.552, 474.554, 474.556, 474.558, 474.560,
4 474.562, 474.564, and 474.600, to read as follows:

456.1-108. 1. Without precluding other means for establishing a sufficient
2 connection with the designated jurisdiction, terms of a trust designating the principal place of
3 administration are valid and controlling if:

4 (1) a trustee's principal place of business is located in or a trustee is a resident of the
5 designated jurisdiction; or

6 (2) all or part of the administration occurs in the designated jurisdiction.

7 2. Without precluding the right of the court to order, approve, or disapprove a
8 transfer, the trustee may transfer the trust's principal place of administration to another state or
9 to a jurisdiction outside of the United States that is appropriate to the trust's purposes, its
10 administration, and the interests of the beneficiaries.

11 3. The trustee shall notify the qualified beneficiaries of a proposed transfer of a trust's
12 principal place of administration not less than sixty days before initiating the transfer. The
13 notice of proposed transfer must include:

14 (1) the name of the jurisdiction to which the principal place of administration is to be
15 transferred;

EXPLANATION — Matter enclosed in bold-faced brackets **[thus]** in the above bill is not enacted and is intended to be omitted from the law. Matter in **bold-face** type in the above bill is proposed language.

16 (2) the address and telephone number at the new location at which the trustee can be
17 contacted;

18 (3) an explanation of the reasons for the proposed transfer;

19 (4) **notice that a change in the place of administration may result in a change of**
20 **governing law, which may affect the rights of beneficiaries in ways that are different**
21 **from current governing law;**

22 (5) the date on which the proposed transfer is anticipated to occur; and

23 [~~5~~] (6) the date, not less than sixty days after the giving of the notice, by which the
24 qualified beneficiary must notify the trustee of an objection to the proposed transfer.

25 4. The authority of a trustee under this section to transfer a trust's principal place of
26 administration without an order of a court terminates if a qualified beneficiary notifies the
27 trustee of an objection to the proposed transfer on or before the date specified in the notice.

28 5. In connection with a transfer of the trust's principal place of administration, the
29 trustee may transfer some or all of the trust property to a successor trustee designated in the
30 terms of the trust or appointed pursuant to section 456.7-704.

456.10-1005. 1. A beneficiary may not commence a proceeding against a trustee for
2 breach of trust more than one year after the last to occur of the date the beneficiary or a
3 representative of the beneficiary was sent a report that adequately disclosed the existence of a
4 potential claim for breach of trust and the date the trustee informed the beneficiary of the time
5 allowed for commencing a proceeding with respect to any potential claim adequately
6 disclosed on the report.

7 2. A report adequately discloses the existence of a potential claim for breach of trust
8 if it provides sufficient information so that the beneficiary or representative knows of the
9 potential claim or should have inquired into its existence.

10 3. If subsection 1 of this section does not apply, a judicial proceeding by a beneficiary
11 against a trustee for breach of trust must be commenced within five years after the first to
12 occur of:

13 (1) the removal, resignation, or death of the trustee;

14 (2) the **occurrence of the event causing a** termination of the beneficiary's interest in
15 the trust; or

16 (3) the **occurrence of the event causing a** termination of the trust.

474.540. Sections 474.540 to 474.564 shall be known and may be cited as the
2 **"Missouri Electronic Wills and Electronic Estate Planning Documents Act".**

474.542. As used in sections 474.540 to 474.564, the following terms mean:

2 (1) **"Electronic", technology having electrical, digital, magnetic, wireless,**
3 **optical, electromagnetic, or similar capabilities;**

4 (2) "Electronic presence", the relationship of two or more individuals in
5 different locations in real time using technology enabling live, interactive audio-visual
6 communication that allows for observation, direct interaction, and communication
7 between or among the individuals;

8 (3) "Electronic will", a will executed electronically in compliance with
9 subsection 1 of section 474.548;

10 (4) "Record", information that is inscribed on a tangible medium or that is
11 stored in an electronic or other medium and is retrievable in perceivable form;

12 (5) "Security procedure", a procedure to verify that an electronic signature,
13 record, or performance is that of a specific person or to detect a change or error in an
14 electronic record, including a procedure that uses an algorithm, code, identifying word
15 or number, encryption, or callback or other acknowledgment procedure;

16 (6) "Sign", with present intent to authenticate or adopt a record, to:

17 (a) Execute or adopt a tangible symbol; or

18 (b) Affix to or logically associate with the record an electronic symbol or
19 process;

20 (7) "State", a state of the United States, the District of Columbia, Puerto Rico,
21 the United States Virgin Islands, a federally recognized Indian tribe, or any territory or
22 insular possession subject to the jurisdiction of the United States;

23 (8) "Will", a codicil and any testamentary instrument that appoints an executor,
24 revokes or revises another will, nominates a guardian, or expressly excludes or limits the
25 right of an individual or class to succeed to property of the decedent passing by intestate
26 succession.

 474.544. An electronic will is a will for all purposes of the laws of this state. The
2 laws of this state applicable to wills and principles of equity applies to an electronic will
3 except as modified by sections 474.540 to 474.564.

 474.546. A will executed electronically but not in compliance with subsection 1 of
2 section 474.548 is an electronic will under sections 474.540 to 474.564 if executed in
3 compliance with the law of the jurisdiction where the testator is:

4 (1) Physically located when the will is signed; or

5 (2) Domiciled, or where the testator resides, when the will is signed or when the
6 testator dies.

 474.548. 1. An electronic will shall be:

2 (1) A record that is readable as text at the time of signing under subdivision (2)
3 of this subsection and remains accessible as text for later reference;

4 (2) Signed by:

5 (a) The testator; or

6 (b) Another individual in the testator's name, in the testator's physical presence,
7 and by the testator's direction; and

8 (3) Signed in the physical or electronic presence of the testator by at least two
9 individuals after witnessing:

10 (a) The signing of the will under subdivision (2) of this subsection; or

11 (b) The testator's acknowledgment of the signing of the will under subdivision
12 (2) of this subsection or acknowledgment of the will.

13 2. The intent of a testator that the record under subdivision (1) of subsection 1 of
14 this section be the testator's electronic will may be established by extrinsic evidence.

15 3. In accordance with section 474.337 or 474.550, a witness to a will shall be a
16 resident of a state and physically located in a state at the time of signing if no self-
17 proving affidavit is signed contemporaneously with the execution of the electronic will.

474.550. At the time of its execution or at any subsequent date, an electronic will
2 may be made self-proved in the same manner as specified in section 474.337 or, if fewer
3 than two witnesses are physically present in the same location as the testator at the time
4 of such acknowledgments, before a remote online notary authorized to perform a
5 remote online notarization in this state under the law of any state or the United States,
6 and evidenced by a remote online notarial certificate, in form and content substantially
7 as follows, subject to the additional requirements under section 486.1165:

8 State of _____

9 County (and/or City) of _____

10 I, the undersigned notary, certify that _____, the testator, and the witnesses,
11 whose names are signed to the attached or foregoing instrument, having
12 personally appeared before me by remote online means, and having been first
13 duly sworn, each then declared to me that the testator signed and executed the
14 instrument as the testator's last will, and that the testator had willingly signed or
15 willingly directed another to sign for the testator, and that the testator executed it
16 as the testator's free and voluntary act for the purposes therein expressed; and
17 that each of the witnesses, in the presence and hearing of the testator, signed the
18 will as witness and that to the best of the witnesses' knowledge the testator was at
19 that time eighteen or more years of age, of sound mind, and under no constraint
20 or undue influence.

21 In witness thereof I have hereunto subscribed my name and affixed my official
22 seal this _____ (date).

23 _____ (official signature and seal of notary)

474.552. 1. An electronic will may revoke all or part of a previous will.

2 2. All or part of an electronic will is revoked by:

3 **(1) A subsequent will that revokes all or part of the electronic will expressly or**
4 **by inconsistency;**

5 **(2) A written instrument signed by the testator declaring the revocation; or**

6 **(3) A physical act, if it is established by a preponderance of the evidence that the**
7 **testator, with the intent of revoking all or part of the will, performed the act or directed**
8 **another individual who performed the act in the testator's physical presence.**

9 **3. If there is evidence that a testator signed an electronic will and neither an**
10 **electronic will nor a certified paper copy of the electronic will can be located after a**
11 **testator's death, there is a presumption that the testator revoked the electronic will even**
12 **if no instrument or later will revoking the electronic will can be located.**

474.554. Without further notice, at any time during the administration of the
2 **estate or, if there is no grant of administration, upon such notice and in such manner as**
3 **the court directs, the court may issue an order under sections 472.400 to 472.490 for a**
4 **custodian of an account held under a terms-of-service agreement to disclose digital**
5 **assets for the purposes of obtaining an electronic will from the account of a deceased**
6 **user. If there is no grant of administration at the time the court issues the order, the**
7 **court's order shall grant disclosure to the petitioner who is deemed a personal**
8 **representative under sections 472.400 to 472.490.**

474.556. 1. An individual may create a certified paper copy of an electronic will
2 **by affirming under penalty of perjury that a paper copy of the electronic will is a**
3 **complete, true, and accurate copy of the electronic will. If the electronic will is made**
4 **self-proving, the certified paper copy of the will shall include the self-proving affidavit**
5 **under section 474.337 or 474.550.**

6 **2. If a rule of law or procedure requires a will to be presented or retained in its**
7 **original form or provides consequences for the information not being presented or**
8 **retained in its original form, that rule of law or procedure shall be satisfied by a**
9 **certified paper copy of an electronic will.**

474.558. In applying and construing sections 474.540 to 474.564, consideration
2 **shall be given to the need to promote uniformity of the law with respect to its subject**
3 **matter among states that enact it.**

474.560. 1. Any written estate planning document may be executed
2 **electronically, and no such estate planning document shall be invalid or void solely**
3 **because it is in electronic form or because it is signed electronically by a settlor, trustee,**
4 **principal, grantor, declarant, or owner, or by a witness to any such person's signature.**
5 **For purposes of this section, "estate planning document" shall include, but not be**
6 **limited to:**

7 **(1) A power of attorney or durable power of attorney;**

- 8 **(2) A health care declaration;**
9 **(3) An advance directive;**
10 **(4) A power of attorney for health care or durable power of attorney for health**
11 **care;**
12 **(5) A revocable trust or amendment thereto, or modification or revocation**
13 **thereof;**
14 **(6) An irrevocable trust;**
15 **(7) A beneficiary deed;**
16 **(8) A nonprobate transfer; or**
17 **(9) A document modifying, amending, correcting, or revoking any written estate**
18 **planning document.**
- 19 **2. (1) An electronic estate planning document or an electronic signature on such**
20 **document shall be attributable to a person if it was the act of the person. The act of the**
21 **person may be shown in any manner, including a showing of the efficacy of a security**
22 **procedure applied to determine the person to which the electronic record or signature**
23 **was attributable.**
- 24 **(2) The effect of attribution of a document or signature to a person under**
25 **subdivision (1) of this subsection shall be determined from the context and surrounding**
26 **circumstances at the time of its creation, execution, or adoption and as provided by**
27 **other law.**
- 28 **3. (1) Unless otherwise provided under its terms, any electronic estate planning**
29 **document may be signed in one or more counterparts, and each separate counterpart**
30 **may be an electronic document or a paper document, provided that all signed**
31 **counterpart pages of each document are incorporated into, or attached to, the**
32 **document.**
- 33 **(2) An individual may create a certified paper copy of any such electronic estate**
34 **planning document by affirming under penalty of perjury that a paper copy of the**
35 **electronic estate planning document is a complete, true, and accurate copy of such**
36 **document. If a rule of law or procedure requires an estate planning document to be**
37 **presented or retained in its original form or provides consequences for the information**
38 **not being presented or retained in its original form, such rule of law or procedure shall**
39 **be satisfied by a certified paper copy of an electronic document.**
- 40 **4. Any written estate planning document, other than a will, that requires one or**
41 **more witnesses to the signature of a principal may be witnessed by any individual or**
42 **individuals in the electronic presence of the principal.**
- 43 **5. A person who acts in reliance upon an electronically executed written estate**
44 **planning document shall not be liable to any person for so relying and may assume**

45 without inquiry the valid execution of the electronically executed written estate planning
46 document.

47 6. This section does not require a written estate planning document to be
48 electronically signed.

49 7. The laws of this state and principles of equity applicable to any estate
50 planning document shall apply to any electronic estate planning document except as
51 modified by this section.

474.562. The provisions of sections 474.540 to 474.564 modify, limit, and
2 supersede the federal Electronic Signatures in Global and National Commerce Act, 15
3 U.S.C. Section 7001 et seq., but do not modify, limit, or supersede Section 101(c) of that
4 act, 15 U.S.C. 7001(c), or authorize electronic delivery of any of the notices described in
5 Section 103(b) of that act, 15 U.S.C. Section 7003(b).

474.564. The provisions of sections 474.540 to 474.564 shall apply to the will of a
2 decedent who dies on or after August 28, 2025, and to each other written estate planning
3 document signed or remotely witnessed on or after August 28, 2025.

474.600. 1. As used in this section, the following terms mean:

2 (1) "Applicable state of emergency", the period between April 6, 2020, and
3 December 31, 2021, during which a state of emergency existed due to a COVID-19
4 public health threat, as proclaimed by the governor, and during which executive orders
5 20-08, 20-10, 20-12, 20-14, 20-19, 21.07, and 21.09 temporarily suspended the physical
6 appearance requirements under this chapter and authorized the use of audio-visual
7 technology to the extent that any Missouri statute required the physical presence of any
8 testator, settlor, principal, witness, notary, or other person necessary for the effective
9 execution of any estate planning document such as a will, trust, or power of attorney, or
10 a self-proving affidavit of the execution of such document, if the conditions set forth in
11 the executive orders were met;

12 (2) "Estate planning document", includes, but is not limited to:

13 (a) A will;

14 (b) A codicil;

15 (c) A power of attorney or durable power of attorney;

16 (d) A health care declaration;

17 (e) An advance directive;

18 (f) A power of attorney for health care or a durable power of attorney for health
19 care;

20 (g) A revocable trust or amendment thereto, or modification or revocation
21 thereof;

22 (h) An irrevocable trust;

- 23 (i) A beneficiary deed;
- 24 (j) A nonprobate transfer; or
- 25 (k) A document modifying, amending, correcting, or revoking any written estate
- 26 planning document;
- 27 (3) "Necessary person", any testator, settlor, grantor, principal, declarant,
- 28 witness, notary, or other person required for the effective execution of any estate
- 29 planning document in this state;
- 30 (4) "Physical presence requirement", includes, but is not limited to, any
- 31 requirement of physical presence under section 404.705, 459.015, 474.320, or 474.337 or
- 32 chapter 486.

33 2. With respect to the execution of an estate planning document, a necessary
 34 person shall be deemed to have satisfied any physical presence requirement under
 35 Missouri statute during the applicable state of emergency if the following requirements
 36 were met:

- 37 (1) The signer affirmatively represented that the signer was physically located in
- 38 the state of Missouri;
- 39 (2) The notary was physically located in the state of Missouri and stated in which
- 40 county the notary was physically located for the jurisdiction on the acknowledgment;
- 41 (3) The notary identified the signers to the satisfaction of the notary and current
- 42 law;
- 43 (4) Any person whose signature was required appeared using video conference
- 44 software where live, interactive audio-visual communication between the principal,
- 45 notary, and any other necessary person allowed for observation, direct interaction, and
- 46 communication at the time of signing; and
- 47 (5) The notary recorded in the notary's journal the exact time and means used to
- 48 perform the notarial act, along with all other required information, absent the wet
- 49 signatures.

50 3. The requirements of subdivisions (1) to (5) of subsection 2 of this section shall
 51 be deemed satisfied if an attorney who is licensed or authorized to practice law in
 52 Missouri and who was present at the remote execution signs a written acknowledgment
 53 made before an officer authorized to administer oaths under the laws of this state, and
 54 evidenced by the officer's certificate, under official seal, affixed to or logically associated
 55 with the acknowledgment. The form and content of the acknowledgment shall be
 56 substantially as follows:

57 State of _____
 58 County of _____

60 I, _____, am an attorney licensed or authorized to practice law in the state
61 of Missouri.

62 On ____ (date), I convened with the following individuals via video conference
63 software that allowed for live, interactive audio-visual communication between
64 the parties to the conference and that also allowed for observation, direction,
65 interaction, and communication between:

66 _____, the (testator, settlor, grantor, principal, or declarant);

67 _____, a witness;

68 _____, a second witness; and

69 _____ a notary public.

70 During the conference, _____, the (testator, settlor, grantor, principal, or
71 declarant) signed the following estate planning document or documents: (a will,
72 codicil, power of attorney, durable power of attorney, health care declaration,
73 advance directive, health care power of attorney, revocable trust, irrevocable
74 trust, beneficiary deed, nonprobate transfer, self-proving affidavit of the
75 execution of a will, or a document modifying, amending, correcting, or
76 revoking one of these estate planning documents).

77 All the parties to the conference represented that they were physically located in
78 the state of Missouri at the time of the signing.

79 I have reviewed and am familiar with the requirements of the applicable
80 executive order or orders in effect at the time and affirm that the remote
81 execution of the estate planning document or documents met all the requirements
82 of the applicable executive order or orders.

83 In witness whereof I, an officer authorized to administer oaths, have hereunto
84 subscribed my name and affixed my official seal this ____ (date).

85 (Signed)

86 _____

87 (SEAL)

88 _____

89 (Official capacity of officer)

✓