SHB 3012 - H AMD 1084
    By Representative Ross

1   Strike everything after the enacting clause and insert the
2   following:

3   "**Sec. 1.** RCW 19.295.010 and 2007 c 67 s 2 are each amended to read
4   as follows:
5   The definitions in this section apply throughout this chapter
6   unless the context clearly requires otherwise.
7   (1) "Market" or "marketing" includes every offer, contract, or
8   agreement to prepare or gather information for the preparation of, or
9   to provide, individualized advice about an estate distribution
10   document.
11   (2) "Estate distribution document" means any one or more of the
12   following documents, instruments, or writings prepared, or intended to
13   be prepared, for a specific person or as marketing materials for
14   distribution to any person, other than documents, instruments,
15   writings, or marketing materials relating to a payable on death account
16   established under RCW 30.22.040(9) or a transfer on death account
17   established under chapter 21.35 RCW:
18   (a) Last will and testament or any writing, however designated,
19   that is intended to have the same legal effect as a last will and
20   testament, and any codicil thereto;
21   (b) Revocable and irrevocable inter vivos trusts and any instrument
22   which purports to transfer any of the trustor's current and/or future
23   interest in real or personal property thereto;
24   (c) Agreement that fixes the terms and provisions of the sale of a
25   decedent's interest in any real or personal property at or following
26   the date of the decedent's death.
27   (3) "Financial institution" means a bank holding company registered
28   under federal law, ((or)) a bank, trust company, mutual savings bank,
29   savings bank, savings and loan association or credit union organized

1 under state or federal law, or any affiliate, subsidiary, officer, or
2 employee of a financial institution.
3   (4) "Person" means any natural person, corporation, partnership,
4 limited liability company, firm, or association."

5   Correct the title.

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