

CERTIFICATION OF ENROLLMENT
ENGROSSED SUBSTITUTE HOUSE BILL 3012

Chapter 161, Laws of 2008

60th Legislature
2008 Regular Session

ESTATE DISTRIBUTION--DOCUMENTS

EFFECTIVE DATE: 06/12/08

Passed by the House February 18, 2008
Yeas 95 Nays 0

FRANK CHOPP

Speaker of the House of Representatives

Passed by the Senate March 4, 2008
Yeas 46 Nays 0

BRAD OWEN

President of the Senate

Approved March 26, 2008, 9:41 a.m.

CHRISTINE GREGOIRE

Governor of the State of Washington

CERTIFICATE

I, Barbara Baker, Chief Clerk of the House of Representatives of the State of Washington, do hereby certify that the attached is **ENGROSSED SUBSTITUTE HOUSE BILL 3012** as passed by the House of Representatives and the Senate on the dates hereon set forth.

BARBARA BAKER

Chief Clerk

FILED

March 26, 2008

**Secretary of State
State of Washington**

ENGROSSED SUBSTITUTE HOUSE BILL 3012

Passed Legislature - 2008 Regular Session

State of Washington 60th Legislature 2008 Regular Session

By House Judiciary (originally sponsored by Representatives Ross, Lantz, Rodne, and Williams)

READ FIRST TIME 02/05/08.

1 AN ACT Relating to estate distribution documents; and amending RCW
2 19.295.010.

3 BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF WASHINGTON:

4 **Sec. 1.** RCW 19.295.010 and 2007 c 67 s 2 are each amended to read
5 as follows:

6 The definitions in this section apply throughout this chapter
7 unless the context clearly requires otherwise.

8 (1) "Market" or "marketing" includes every offer, contract, or
9 agreement to prepare or gather information for the preparation of, or
10 to provide, individualized advice about an estate distribution
11 document.

12 (2) "Estate distribution document" means any one or more of the
13 following documents, instruments, or writings prepared, or intended to
14 be prepared, for a specific person or as marketing materials for
15 distribution to any person, other than documents, instruments,
16 writings, or marketing materials relating to a payable on death account
17 established under RCW 30.22.040(9) or a transfer on death account
18 established under chapter 21.35 RCW:

1 (a) Last will and testament or any writing, however designated,
2 that is intended to have the same legal effect as a last will and
3 testament, and any codicil thereto;

4 (b) Revocable and irrevocable inter vivos trusts and any instrument
5 which purports to transfer any of the trustor's current and/or future
6 interest in real or personal property thereto;

7 (c) Agreement that fixes the terms and provisions of the sale of a
8 decedent's interest in any real or personal property at or following
9 the date of the decedent's death.

10 (3) "Financial institution" means a bank holding company registered
11 under federal law, (~~(or)~~) a bank, trust company, mutual savings bank,
12 savings bank, savings and loan association or credit union organized
13 under state or federal law, or any affiliate, subsidiary, officer, or
14 employee of a financial institution.

15 (4) "Person" means any natural person, corporation, partnership,
16 limited liability company, firm, or association.

Passed by the House February 18, 2008.

Passed by the Senate March 4, 2008.

Approved by the Governor March 26, 2008.

Filed in Office of Secretary of State March 26, 2008.