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	PROBATE LAW AMENDMENTS							
2011 GENERAL SESSION								
STATE OF UTAH Chief Sponsor: John L. Valentine								
LO	NG TITLE							
Gen	eral Description:							
	This bill clarifies definitions used for governing instruments in probate.							
Higl	hlighted Provisions:							
	This bill:							
	 clarifies definitions by providing specific cross references to existing definitions for 							
gove	erning instruments;							
	► adds the terms "share and share alike" and "to the survivor of them" to the							
defii	nitions of terms used in governing instruments; and							
	 provides how specific terms used in a governing instrument control how property is 							
divi	ded.							
Mor	ney Appropriated in this Bill:							
	None							
Oth	er Special Clauses:							
	None							
Utal	h Code Sections Affected:							
AM	ENDS:							
	75-2-106 , as last amended by Laws of Utah 2010, Chapter 93							
	75-2-709 , as enacted by Laws of Utah 1998, Chapter 39							
Be in	t enacted by the Legislature of the state of Utah:							
	Section 1. Section 75-2-106 is amended to read:							
	75-2-106. Definitions Per capita at each generation Terms in governing							

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instruments.

31	1)	As	used	in	this	section
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- (a) "Deceased descendant," "deceased parent," or "deceased grandparent" means a descendant, parent, or grandparent who either predeceased the decedent or is considered to have predeceased the decedent under Section 75-2-104.
- (b) "Surviving descendant" means a descendant who neither predeceased the decedent nor is considered to have predeceased the decedent under Section 75-2-104.
- (2) (a) If, under Subsection 75-2-103(1)(a), a decedent's intestate estate or a part thereof passes "per capita at each generation" to the decedent's descendants, the estate or part thereof is divided into as many equal shares as there are:
- (i) surviving descendants in the generation nearest to the decedent which contains one or more surviving descendants; and
- (ii) deceased descendants in the same generation who left surviving descendants, if any.
 - (b) Each surviving descendant in the nearest generation is allocated one share.
 - (c) The remaining shares, if any, are combined and then divided in the same manner among the surviving descendants of the deceased descendants as if the surviving descendants who were allocated a share and their surviving descendants had predeceased the decedent.
- (3) (a) If, under Subsection 75-2-103(1)(c) or (d), a decedent's intestate estate or a part thereof passes "per capita at each generation" to the descendants of the decedent's deceased parents or either of them or to the descendants of the decedent's deceased paternal or maternal grandparents or either of them, the estate or part thereof is divided into as many equal shares as there are:
- (i) surviving descendants in the generation nearest the deceased parents or either of them, or the deceased grandparents or either of them, that contains one or more surviving descendants; and
- 56 (ii) deceased descendants in the same generation who left surviving descendants, if 57 any.

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(b) Each surviving descendant in the nearest generation is allocated one share.

- (c) The remaining shares, if any, are combined and then divided in the same manner among the surviving descendants of the deceased descendants as if the surviving descendants who were allocated a share and their surviving descendants had predeceased the decedent.
- (4) (a) If, under Subsection 75-2-103(1)(e), a decedent's intestate estate or a part of the estate passes "per capita at each generation" to the descendants of the decedent's deceased spouse, the estate or part of the estate is divided into as many equal shares as there are:
- (i) surviving descendants in the generation nearest the deceased spouse that contains one or more surviving descendants; and
- (ii) deceased descendants in the same generation who left surviving descendants, if any.
 - (b) Each surviving descendant in the nearest generation is allocated one share.
- (c) The remaining shares, if any, are combined and then divided in the same manner among the surviving descendants of the deceased descendants as if the surviving descendants who were allocated a share and their surviving descendants had predeceased the decedent.
- (5) Any reference to this section found in a governing instrument for the definitions of "per capita," "per stirpes," "by representation," "share and share alike," "to the survivor of them," or "by right of representation" shall be considered a reference to Section 75-2-709.
- Section 2. Section **75-2-709** is amended to read:
- 75-2-709. Definitions -- Representation -- Per capita at each generation -- Per stirpes.
 - (1) As used in this section:

- (a) "Deceased child" or "deceased descendant" means a child or a descendant who either predeceased the distribution date or is considered to have predeceased the distribution date under Section 75-2-702.
- (b) "Distribution date," with respect to an interest, means the time when the interest is to take effect in possession or enjoyment. The distribution date need not occur at the beginning or end of a calendar day, but can occur at a time during the course of a day.

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(c) "Surviving ancestor," "surviving child," or "surviving descendant" means an ancestor, a child, or a descendant who neither predeceased the distribution date nor is considered to have predeceased the distribution date under Section 75-2-702.

- (2) If an applicable statute or a governing instrument calls for property to be distributed or taken "per capita at each generation," the property is divided into as many equal shares as there are:
- (a) surviving descendants in the generation nearest to the designated ancestor which contains one or more surviving descendants; and
- (b) deceased descendants in the same generation who left surviving descendants, if any. Each surviving descendant in the nearest generation is allocated one share. The remaining shares, if any, are combined and then divided in the same manner among the surviving descendants of the deceased descendants as if the surviving descendants who were allocated a share and their surviving descendants had predeceased the distribution date.
- (3) If a governing instrument calls for property to be distributed or taken "per stirpes," "by representation," or "by right of representation," the property is divided into as many equal shares as there are:
 - (a) surviving children of the designated ancestor; and
- (b) deceased children who left surviving descendants. Each surviving child, if any, is allocated one share. The share of each deceased child with surviving descendants is divided in the same manner, with subdivision repeating at each succeeding generation until the property is fully allocated among surviving descendants.
- (4) If a governing instrument calls for property to be distributed or taken "per capita," "share and share alike," or "to the survivor of them," the property is divided into as many equal shares as there are living persons named on the distribution date.
- [(4)] (5) For the purposes of Subsections (2) and (3), an individual who is deceased and left no surviving descendant is disregarded, and an individual who leaves a surviving ancestor who is a descendant of the designated ancestor is not entitled to a share.