

Bill Summary
1st Session of the 59th Legislature

Bill No.:

SB 999

Version:

HASB

Author:

Sen. Murdock

Date:

05/18/2025

Bill Analysis

SB 999 directs the State Treasurer to provide a copy of the will, trust, and any codicils or amendments to such will or trust instrument received by the Office to anyone who provides the State Treasurer with evidence of the death of the testator or settlor. The measure defines “written agreement” to mean a legally binding document between a claimant and the claimant’s representative outlining the terms and conditions of the agreement. The measure provides that if a will or trust instrument is included among the contents of a safe deposit box or other safekeeping repository delivered to the State Treasurer, the State Treasurer must provide a copy of the will, trust, and any codicils or amendments to such will or trust instrument, upon request, to a claimant or claimant’s representative. The measure requires any person establishing a claim to use the claim form prescribed by the State Treasurer. Any claim that fails to use the form shall be void. The measure directs the State Treasurer to pay over or deliver to the claimant the balance remaining after deduction and payment of the amount due to the claimant’s representative by the State Treasurer if a claim submitted by a claimant’s representative is authorized. The State Treasurer shall maintain an electronic copy of all records related to the property received by the State Treasurer.

House Amendments

HA’s to SB 999 adds language relating to the State Treasurer maintaining electronic copies, defines “written agreement,” and restores the title.

Prepared by: Kalen Taylor