

**Senate Bill No. 64**

(By Senators Facemire and Beach)

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[Introduced January 8, 2014; referred to the Committee on the  
Judiciary.]  
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10 A BILL to amend and reenact §41-1-6 of the Code of West Virginia,  
11 1931, as amended; and to amend and reenact §42-1-1 of said  
12 code, all relating to automatic revocation of a will upon  
13 legal separation; and excluding from the definition of  
14 "surviving spouse", for purposes of descent and distribution,  
15 a person who is a party to a decree of legal separation.

16 *Be it enacted by the Legislature of West Virginia:*

17 That §41-1-6 of the Code of West Virginia, 1931, as amended,  
18 be amended and reenacted; and that §42-1-1 of said code be amended  
19 and reenacted, all to read as follows:

**CHAPTER 41. WILLS.**

**ARTICLE 1. CAPACITY TO MAKE; REQUISITES; VALIDITY.**

**§41-1-6. Revocation by divorce, annulment and legal separation; no**

1                   **revocation by other changes of circumstances.**

2           (a) If after executing a will the testator is divorced,  
3 legally separated or his or her marriage annulled, the divorce,  
4 legal separation or annulment revokes any disposition or  
5 appointment of property made by the will to the former spouse, any  
6 provision conferring a general or special power of appointment on  
7 the former spouse and any nomination of the former spouse as  
8 executor, trustee, conservator or guardian, unless the will  
9 expressly provides otherwise. Property prevented from passing to  
10 a former spouse because of revocation by divorce, legal separation  
11 or annulment passes as if the former spouse failed to survive the  
12 decedent, except that the provisions of section three, article  
13 three, chapter forty-one do not apply and other provisions  
14 conferring some power or office on the former spouse are  
15 interpreted as if the spouse failed to survive the decedent. If  
16 provisions are revoked solely by this section, they are revived by  
17 testator's remarriage to the former spouse. For purposes of this  
18 section, divorce, legal separation or annulment means any divorce,  
19 legal separation or annulment which would exclude the spouse as a  
20 surviving spouse. ~~A decree of separation which does not terminate~~  
21 ~~the status of husband and wife is not a divorce for purposes of~~  
22 ~~this section.~~ No change of circumstances other than as described  
23 in this section revokes a will.

1 (b) This section applies to all divorces, legal separations,  
2 annulments or remarriages which become effective after June 5,  
3 1992.

4 **CHAPTER 42. DESCENT AND DISTRIBUTION.**

5 **ARTICLE 1. DESCENT.**

6 **§42-1-1. General definitions.**

7 Subject to additional definitions contained in the subsequent  
8 articles that are applicable to specific articles, parts or  
9 sections, and unless the context otherwise requires in this code:

10 (1) "Agent" includes an attorney-in-fact under a durable or  
11 nondurable power of attorney, an individual authorized to make  
12 decisions concerning another's health care and an individual  
13 authorized to make decisions for another under a natural death act.

14 (2) "Beneficiary" as it relates to a trust beneficiary  
15 includes a person who has ~~any~~ a present or future interest, vested  
16 or contingent, and also includes the owner of an interest by  
17 assignment or other transfer. As ~~it~~ "beneficiary" relates to a  
18 charitable trust, it includes any person entitled to enforce the  
19 trust. As ~~it~~ "beneficiary" relates to a "beneficiary of a  
20 beneficiary designation", it refers to a beneficiary of an account  
21 with POD designation, ~~of~~ to a security registered in beneficiary  
22 form (TOD) or other nonprobate transfer at death. ~~and,~~ As ~~it~~  
23 "beneficiary" relates to a "beneficiary designated in a governing

1 instrument", it includes a grantee of a deed, a devisee, a trust  
2 beneficiary, a beneficiary of a beneficiary designation or a person  
3 in whose favor a power of attorney or a power held in any  
4 individual, fiduciary or representative capacity is exercised.

5 (3) "Court" means the county commission or branch in this  
6 state having jurisdiction in matters relating to the affairs of  
7 decedents.

8 (4) "Conservator" means a person who is appointed by a court  
9 to manage the estate of a protected person.

10 (5) "Descendant" of an individual means all of his or her  
11 descendants of all generations with the relationship of parent and  
12 child at each generation being determined by the definition of  
13 child and parent contained in this code.

14 (6) "Devise" when used as a noun, means a testamentary  
15 disposition of real or personal property and, when used as a verb,  
16 means to dispose of real or personal property by will.

17 (7) "Devisee" means a person designated in a will to receive  
18 a devise. In the case of a devise to an existing trust or trustee  
19 or to a trustee on trust described by will, the trust or trustee is  
20 the devisee and the beneficiaries are not devisees.

21 (8) "Distributee" means ~~any~~ a person who has received property  
22 of a decedent from his or her personal representative other than as  
23 a creditor or purchaser. A testamentary trustee is a distributee

1 only to the extent of distributed assets or increment thereto  
2 remaining in his or her hands. A beneficiary of a testamentary  
3 trust to whom the trustee has distributed property received from a  
4 personal representative is a distributee of the personal  
5 representative. For the purposes of this provision, "testamentary  
6 trustee" includes a trustee to whom assets are transferred by will  
7 to the extent of the devised assets.

8 (9) "Estate" includes the property of the decedent, trust or  
9 other person whose affairs are subject to this code as originally  
10 constituted and as it exists from time to time during  
11 administration.

12 (10) "Exempt property" means that property of a decedent's  
13 estate which is provided ~~for~~ in section forty-eight, article VI of  
14 the Constitution.

15 (11) "Fiduciary" includes a personal representative, guardian,  
16 conservator and trustee.

17 (12) "Foreign personal representative" means a personal  
18 representative appointed by another jurisdiction.

19 (13) "Formal proceedings" means proceedings conducted before  
20 a judge with notice to interested persons.

21 (14) "Governing instrument" means a deed, will, trust,  
22 insurance or annuity policy, account with POD designation, security  
23 registered in beneficiary form (TOD), pension, profit-sharing,

1 retirement or similar benefit plan, instrument creating or  
2 exercising a power of appointment or a power of attorney or a  
3 denotive, appointive or nominative instrument of any other type.

4 (15) "Guardian" means a person who has qualified as a guardian  
5 of a minor or incapacitated person pursuant to testamentary or  
6 court appointment but excludes one who is merely a guardian ad  
7 litem.

8 (16) "Heirs" means persons, including the surviving spouse and  
9 the state, who are entitled under the statutes of intestate  
10 succession to the property of a decedent.

11 (17) "Informal proceedings" mean those conducted without  
12 notice to interested persons by an officer of the court acting as  
13 a registrar for probate of a will or appointment of a personal  
14 representative.

15 (18) "Interested person" includes heirs, devisees, children,  
16 spouses, creditors, beneficiaries and any others having a property  
17 right in or claim against a trust estate or the estate of a  
18 decedent, ward or protected person. It also includes persons  
19 having priority for appointment as personal representative and  
20 other fiduciaries representing interested persons. The meaning as  
21 it relates to particular persons may vary from time to time and  
22 must be determined according to the particular purposes of, and  
23 matter involved in, any proceeding.

1           (19) "Issue" of a person means descendant as defined in  
2 subdivision (5) of this section.

3           (20) "Joint tenants with the right of survivorship" and  
4 "community property with the right of survivorship" includes  
5 coowners of property held under circumstances that entitle one or  
6 more to the whole of the property on the death of the other or  
7 others but excludes forms of coownership registration in which the  
8 underlying ownership of each party is in proportion to that party's  
9 contribution.

10          (21) "Lease" includes an oil, gas or other mineral lease.

11          (22) "Letters" includes letters testamentary, letters of  
12 guardianship, letters of administration and letters of  
13 conservatorship.

14          (23) "Minor" means a person who is under eighteen years of  
15 age.

16          (24) "Mortgage" means any deed of trust, conveyance, agreement  
17 or arrangement in which property is encumbered or used as security.

18          (25) "Nonresident decedent" means a decedent who was domiciled  
19 in another jurisdiction at the time of his or her death.

20          (26) "Parent" includes any person entitled to take, or who  
21 would be entitled to take if the child died without a will, as a  
22 parent under this code by intestate succession from the child whose  
23 relationship is in question and excludes any person who is only a

1 stepparent, foster parent or grandparent.

2       (27) "Payor" means a trustee, insurer, business entity,  
3 employer, government, governmental agency or subdivision or ~~any~~  
4 other person authorized or obligated by law or a governing  
5 instrument to make payments.

6       (28) "Person" means an individual or an organization.

7       (29) "Personal representative" includes executor,  
8 administrator, successor personal representative, special  
9 administrator and persons who perform substantially the same  
10 function under the law governing their status. "General personal  
11 representative" excludes special administrator.

12       (30) "Petition" means a written request to the court for an  
13 order after notice.

14       (31) "Proceeding" includes action at law and suit in equity.

15       (32) "Property" includes both real and personal property or  
16 any interest therein and means anything that may be the subject of  
17 ownership.

18       (33) "Security" includes any note, stock, treasury stock,  
19 bond, debenture, evidence of indebtedness, certificate of interest  
20 or participation in an oil, gas or mining title or lease or in  
21 payments out of production under such a title or lease, collateral  
22 trust certificate, transferable share, voting trust certificate or,  
23 in general, any interest or instrument commonly known as a security



1 or any certificate of interest or participation, any temporary or  
2 interim certificate, receipt or certificate of deposit for, or any  
3 warrant or right to subscribe to or purchase, any of the foregoing.

4 (34) "Settlement" in reference to a decedent's estate,  
5 includes the full process of administration, distribution and  
6 closing.

7 (35) "State" means a state of the United States, the District  
8 of Columbia, the Commonwealth of Puerto Rico or any territory or  
9 insular possession subject to the jurisdiction of the United  
10 States.

11 (36) "Successor personal representative" means a personal  
12 representative, other than a special administrator, who is  
13 appointed to succeed a previously appointed personal  
14 representative.

15 (37) "Successors" means persons, other than creditors, who are  
16 entitled to property of a decedent under his or her will or this  
17 code.

18 (38) "Survive" means that an individual has neither  
19 predeceased an event, including the death of another individual,  
20 nor is deemed to have predeceased an event. The term includes its  
21 derivatives, such as "survives", "survived", "survivor" and  
22 "surviving".

23 (39) "Surviving spouse" means the person to whom the decedent

1 was married at the time of the decedent's death except that a  
2 person who is a named party to a decree of legal separation is not  
3 deemed a surviving spouse.

4 (40) "Testacy proceeding" means a proceeding to establish a  
5 will or determine intestacy.

6 (41) "Testator" includes an individual of either sex.

7 (42) "Trust" includes an express trust, private or charitable,  
8 with additions thereto, wherever and however created. The term  
9 also includes a trust created or determined by judgment or decree  
10 under which the trust is to be administered in the manner of an  
11 express trust. The term excludes other constructive trusts and  
12 excludes resulting trusts, conservatorships, personal  
13 representatives and custodial arrangements including that relating  
14 to gifts or transfers to minors, dealing with special custodial  
15 situations, business trusts providing for certificates to be issued  
16 to beneficiaries.

17 (43) "Trustee" includes an original, additional or successor  
18 trustee, whether or not appointed or confirmed by court.

19 (44) "Will" includes codicil and any testamentary instrument  
20 that merely appoints an executor, revokes or revises another will,  
21 nominates a guardian or expressly excludes or limits the right of  
22 an individual or class to succeed to property of the decedent  
23 passing by intestate succession.

NOTE: The purpose of this bill is to automatically revoke a will following a legal separation and to exclude from the definition of "surviving spouse", for purposes of descent and distribution, a person who is a party to a decree of legal separation.

Strike-throughs indicate language that would be stricken from the present law and underscoring indicates new language that would be added.