

One Hundred Ninth Legislature - Second Session - 2026

Introducer's Statement of Intent

LB758

Chairperson: Senator Carolyn Bosn

Committee: Judiciary

The following constitutes the reasons for this bill and the purposes which are sought to be accomplished thereby:

LB758 amends section 30-2715 to explicitly clarify that provisions for non-probate transfer in annuity policies, accounts with POD designations, securities registered in beneficiary form, and profit sharing plans are non-testamentary.

LB 758 also creates a new section to allow charitable organizations to which investment funds have been bequeathed to present an affidavit, with required documentation, to the holder of the interest in the property or to any person with information about the property for the purpose of obtaining the interest in the property or information about the property. If the required documentation is provided, the party controlling the property must turn over the property to the charitable organization within 30 days or the organization may bring an action against such holder to obtain the interest or against such person to obtain the information.

The new section also prohibits institutions holding property, or persons with property information, from requiring the charitable organization to open an account with or become a customer of the institution, requiring co-beneficiaries to submit claims simultaneously or imposing coordination deadlines among co-beneficiaries, delaying payment, delivery, or transfer to any co-beneficiary because other co-beneficiaries have not submitted their claim documentation, or requesting personal information from any individual employed by or serving on the board of the charitable organization.

Principal Introducer: _____

Senator R. Brad von Gillern