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How to Complete an Arizona Disclaimer

Disclaimer of Interest • A.R.S. § 14-10001 et seq.

INSTRUCTIONS — KEEP FOR YOUR RECORDS. DO NOT ATTACH THIS PAGE TO YOUR DOCUMENT.

About this form. A disclaimer lets a person refuse an inheritance, gift, trust share or beneficiary payment, so it passes to the next person in line. People use it for tax planning or to let an inheritance go to their children.

1. **Describe the interest exactly**
   Name the decedent or donor, the source and the property.
2. **Choose all or part**
   Do not accept any benefit from the property first.
3. **Act quickly**
   For federal tax purposes a disclaimer generally must be made within nine months.
4. **Sign before a notary and deliver it**
   Deliver it to the executor, trustee or account holder. Record it if real estate is involved.

Signing requirements: Signed by the disclaimant before a notary.

After It's Signed

- A disclaimer is irrevocable. Speak with an attorney or tax adviser before signing.

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Have questions about your Disclaimer? To consult with an attorney, contact **Gavrilov & Brooks Law Firm** at **(916) 504-0529** or **www.gavrilovlaw.com**.

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DISCLAIMER OF INTEREST IN PROPERTY

State of Arizona • Uniform Disclaimer of Property Interests Act, A.R.S. § 14-10001 et seq.

Disclaimant (person disclaiming)

Address

Decedent, donor or creator of the interest

Date of death or transfer

Source of interest (will, intestacy, trust, beneficiary designation, joint account, beneficiary deed, etc.)

1. DESCRIPTION OF THE INTEREST

The disclaimant has the following interest in property (describe the property, account or share, and how it passes to the disclaimant):

2. DECLARATION OF DISCLAIMER

The disclaimant irrevocably and unqualifiedly disclaims (check one):

☐ All of the interest described above.

☐ The following part or fraction of the interest:

The disclaimant has not accepted the disclaimed interest or any of its benefits. The disclaimed interest passes as provided in A.R.S. Title 14, Chapter 10, unless the governing instrument provides otherwise. This disclaimer is intended to be a qualified disclaimer under Section 2518 of the Internal Revenue Code.

3. REAL ESTATE (if any)

Property address, county and APN (record this disclaimer in that county)

4. DELIVERY

This disclaimer will be delivered to the personal representative, trustee or other person holding the property:

Delivered to (name and capacity)

Date delivered

X

Disclaimant signature

Date

Printed name

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ACKNOWLEDGMENT

STATE OF ARIZONA

COUNTY OF _____

The foregoing instrument was acknowledged before me this _____ day of _____, 20____, by _____ (name(s) of person(s) acknowledging).

X _____
Signature of Notary Public

_____
Notary Public (printed name)

_____ _____
My commission expires Commission number

(Notary seal)

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