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How to Complete an Arizona Receipt and Release

Receipt, Release and Refunding Agreement • Estate or trust distribution

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

About this form. Personal representatives and trustees commonly ask each beneficiary to sign this when receiving an inheritance. The beneficiary confirms what was received, releases the personal representative or trustee, and agrees to refund money if debts or taxes later come due.

1. **Identify the estate or trust and the beneficiary**
   Include the probate case number if there is one.
2. **Describe the distribution**
   Cash amount or property received.
3. **Sign before a notary**
   Each beneficiary signs a separate agreement.

Signing requirements: Signed by the beneficiary before a notary.

After It's Signed

- Ask questions before signing; a release limits later claims.

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

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RECEIPT, RELEASE AND REFUNDING AGREEMENT

State of Arizona • Estate or trust distribution

Estate of (decedent) or name of trust

Date of death

County

Probate case no. (if any)

Personal representative or trustee

Beneficiary receiving distribution

Beneficiary address

1. RECEIPT

The beneficiary acknowledges receipt of the following distribution, in full / partial (circle one) satisfaction of the beneficiary's share:

Cash amount and/or description of property received

2. RELEASE

In consideration of the distribution, the beneficiary releases and discharges the personal representative or trustee, individually and in that capacity, from all claims and liability relating to the beneficiary's share, to the extent of the distribution received. The beneficiary (check one):

☐ has reviewed an informal accounting and approves it.

☐ waives a formal accounting.

3. REFUNDING AGREEMENT

If any part of the distribution is later needed to pay debts, taxes or expenses of administration, or to correct an overpayment, the beneficiary agrees to refund the amount needed on request, up to the value of the distribution received.

4. BINDING EFFECT

This agreement binds the beneficiary and the beneficiary's heirs, personal representatives and assigns. A copy has the same effect as the original.

X

Beneficiary 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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