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How to Complete a Receipt and Release by Beneficiary

Acknowledging an Inheritance Received From a Trust or Estate

INSTRUCTIONS — KEEP FOR YOUR RECORDS. DO NOT ATTACH THIS PAGE TO YOUR RECEIPT AND RELEASE.

About this form. When a trustee or executor distributes an inheritance, they usually ask each beneficiary to sign a **receipt** confirming what was received. Some also ask for a **release**. California law protects beneficiaries here: a trustee may **not** require a release as a condition of making a distribution the trust calls for (Probate Code § 16004.5). This form lets the beneficiary choose a receipt only, or a receipt with a voluntary release.

1. **Check what you are receiving**
   Compare the distribution to the trust or will and any accounting you received. Ask questions before signing.
2. **Fill in the trust or estate details**
   Enter the trust name and date (or the estate and court case number) and the trustee or executor's name.
3. **List each item received**
   Describe each payment, account, item, or property, with its value. Mark whether this is your full share or a partial distribution.
4. **Choose receipt only, or receipt and release**
   A release gives up claims about the distribution. You do not have to sign one to receive a distribution the trust requires.
5. **Sign in front of a notary**
   Do **not** sign ahead of time. Bring a current government-issued photo ID. We come to your home or office.
6. **Return it to the trustee or executor**
   Give the signed original to the trustee or executor and keep a copy for your records.

Good to Know

- Trustees: keep each signed receipt with the trust records and your final accounting.
- In a court-supervised probate, receipts are usually filed with the court before the estate is closed.
- If you think the distribution is wrong or incomplete, talk to an attorney before signing a release.

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SCAN TO BOOK

Questions about this document? Talk to an attorney. Gavrilov & Brooks Law Firm has attorneys licensed in California, Nevada, and other states. Phone and video consultations are available. **(916) 504-0529** · **www.gavrilovlaw.com**

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YOUR FORM BEGINS ON THE NEXT PAGE

RECEIPT AND RELEASE BY BENEFICIARY

Acknowledgment of a Distribution From a Trust or Estate

1. Beneficiary. I, the undersigned,

_____ _____

(full name of beneficiary) (address)

am a beneficiary of the (mark one) ☐ trust ☐ estate named below:

_____

(name of trust and date, or "Estate of [decedent]" and court case number)

_____

(name of trustee, executor, or administrator making the distribution)

2. Receipt. I acknowledge that I have received the following property as a distribution:

Description of property received (cash, account, item, or real property)	Value or amount

This distribution is (mark one) ☐ my full and final share ☐ a partial distribution of my share.

3. Release (mark one):

☐ **Receipt only.** I acknowledge receipt of the property above and give no release.

☐ **Receipt and voluntary release.** I release the trustee or personal representative named above from liability for the distribution I received, to the extent permitted by law. I give this release **voluntarily**; it was not made a condition of my distribution (California Probate Code Section 16004.5).

4. Refund (optional; mark if agreed). ☐ If it is later determined that funds are needed to pay taxes, debts, or expenses of the trust or estate, or that I received more than my share, I agree to refund my proportionate share, up to the value I received.

I have read this receipt, had the opportunity to consult an attorney, and sign it voluntarily.

Dated: _____

_____ _____

(signature of beneficiary) (printed name)

Sign in front of the notary public, who will complete the acknowledgment on the next page.

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CERTIFICATE OF ACKNOWLEDGMENT

Notary acknowledgment of the beneficiary's signature on this Receipt and Release.

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California)

County of _____)

On _____ before me, _____

(here insert name and title of the officer)

personally appeared _____

, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

(Seal)

Signature _____