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How to Complete Your North Carolina Disclaimer of Interest

Renunciation of Property Interest (G.S. Chapter 31B)

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

About this form. A disclaimer lets you **refuse** an inheritance, trust interest, or other property, so it passes to the next person in line instead of you.

1. **Describe what you refuse (Pages 1–2)**
   Identify the source and the property, in whole or in part.
2. **Mind the deadline**
   For federal tax purposes, a disclaimer generally must be made within **nine months** and before you accept any benefit. Get advice first.
3. **Sign before a notary (Page 2)**
   Bring a current, government-issued photo ID.

After It's Signed

- Deliver it to the personal representative, trustee, or person holding the property.
- Record the original with the Register of Deeds of the county where the property is located. if it involves real estate.

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North Carolina-Commissioned Notaries

SCAN TO BOOK

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

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YOUR FORM BEGINS ON THE NEXT PAGE

DISCLAIMER OF PROPERTY INTEREST

(Renunciation of Property, G.S. Chapter 31B)

I,

Name of disclaimant | Address

declare that I disclaim the interest described below. Source of the interest:

Name of decedent, settlor, or other source | Date of death or transfer

Passing under (will, trust, intestacy, beneficiary designation, joint account, other)

Interest disclaimed (include county and legal description for real property):

Disclaimant's initials: _____

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Extent (check one):

the **entire** interest described above.

only the following portion or percentage:

Portion or percentage

This disclaimer is irrevocable. I have not accepted the interest or any of its benefits. I intend this to be a qualified disclaimer for federal tax purposes to the extent applicable. This disclaimer is delivered to the person named below.

Delivered to (name and capacity: personal representative, trustee, other)

Date delivered

Date

X

Disclaimant

Printed name

NOTARY ACKNOWLEDGMENT

STATE OF NORTH CAROLINA)

COUNTY OF))

I certify that the following person(s) personally appeared before me this day, each acknowledging to me that he or she signed the foregoing document:

name(s) of disclaimant

Date

X

Notary Public

(Notary seal)

Notary's printed name

Notary Public, County of commission

My commission expires

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