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How to Complete Your Ohio Disclaimer of Interest

Disclaimer of Property Interest (R.C. 5815.36)

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. Ohio requires the disclaimer to be in writing, signed, and delivered; a disclaimer of real estate should be recorded. 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 county recorder of the county where the property is located. if it involves real estate.

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Have questions about this document? To consult with an attorney, contact **Gavrilov & Brooks Law Firm** at **(916) 504-0529** or **www.gavrilovlaw.com**. Attorneys licensed in California, Nevada, and other states.

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DISCLAIMER OF PROPERTY INTEREST

(Ohio Revised Code 5815.36)

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 OHIO)
) ss.
**COUNTY OF) **

This document was acknowledged before me on

(date)

by (name of disclaimant)

X

Notary Public

(Notary seal)

Notary's printed name

My commission expires

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