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How to Complete a Pennsylvania Acceptance of Trusteeship

Acceptance of Trusteeship • 20 Pa.C.S. § 7761

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

About this form. A successor trustee uses this form to formally accept the role, for example after the original trustee dies or resigns. Banks and title companies often ask for a notarized acceptance before letting the new trustee act.

1. **Identify the trust**
   Exact trust name, date and settlor(s).
2. **State how you became trustee**
   Original, successor, or co-trustee, and who you are replacing.
3. **Sign before a notary**
   Bring a current photo ID.
4. **Gather supporting papers**
   Institutions may also ask for a death certificate or the prior trustee's resignation, and a Certification of Trust.

Signing requirements: Signed by the accepting trustee before a notary.

After It's Signed

- Notify the trust beneficiaries that you are now serving as trustee.

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

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ACCEPTANCE OF TRUSTEESHIP

Commonwealth of Pennsylvania • 20 Pa.C.S. § 7761

Trustee accepting

Address

Name of trust

Date of trust

Settlor(s)

I was designated in the trust agreement named above (check one):

☐ as an original trustee.

☐ as successor trustee, to serve in place of the following trustee:

Prior trustee name

Reason (death, resignation, incapacity, removal)

☐ as co-trustee with:

Co-trustee name

I accept the office of trustee, effective on the date below. I agree to administer the trust in good faith, in accordance with its terms and purposes and the interests of the beneficiaries, and in accordance with the Pennsylvania Uniform Trust Act, 20 Pa.C.S. Chapter 77. I understand that I must keep the beneficiaries reasonably informed, keep trust property separate from my own, and keep adequate records.

Effective date of acceptance

X _____

Trustee signature

Date

Printed name

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ACKNOWLEDGMENT

COMMONWEALTH OF PENNSYLVANIA

COUNTY OF _____

This record was acknowledged before me on _____ (date) by _____ (name(s) of individual(s)).

X _____
Signature of notarial officer

_____
Title of office (e.g., Notary Public)

_____ _____
My commission expires Commission number

(Notary seal)

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