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How to Complete a Pennsylvania Receipt, Release and Refunding Agreement

Receipt, Release and Refunding Agreement • Estate distribution

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

About this form. Executors and administrators in Pennsylvania commonly ask each beneficiary to sign this before or when receiving an inheritance. The beneficiary confirms what was received, releases the personal representative, and agrees to refund money if debts or taxes later come due. It often lets the estate close without a formal court accounting.

1. **Identify the estate and beneficiary**
   Use the county and Register of Wills file number from the letters.
2. **Describe the distribution**
   The cash amount or the property received.
3. **Choose accounting or waiver**
   Confirm you reviewed an informal accounting, or waive a formal account.
4. **Sign before a notary**
   Each beneficiary signs a separate agreement. Bring a current photo ID.

Signing requirements: Signed by the beneficiary before a notary.

After It's Signed

- Give the original to the personal representative and keep a copy.
- Ask questions before signing; a release limits later claims.

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Have questions about your Refunding Agreement? 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

Commonwealth of Pennsylvania • Estate distribution

Estate of (decedent)

Date of death

County

Register of Wills file no.

Personal representative(s)

Beneficiary (person receiving distribution)

Beneficiary address

1. RECEIPT

The beneficiary acknowledges receipt from the personal representative of the following distribution from the estate, 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, individually and as personal representative, and the personal representative's heirs and assigns, from all claims and liability relating to the beneficiary's share of the estate, to the extent of the distribution received. The beneficiary (check one):

☐ has reviewed an informal accounting of the estate and approves it.

☐ waives the filing of a formal account with the Orphans' Court.

3. REFUNDING AGREEMENT

If it is later determined that any part of the distribution is needed to pay debts, taxes (including Pennsylvania inheritance tax and federal estate tax), expenses of administration, or to correct an overpayment, the beneficiary agrees to refund to the personal representative, on request, the amount needed, up to the value of the distribution received, as provided for refunding agreements under 20 Pa.C.S. Chapter 35.

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

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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