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How to Complete a Pennsylvania Resignation of Trustee

Resignation of Trustee • 20 Pa.C.S. § 7765

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

About this form. A trustee who no longer wants to serve can resign by giving written notice. Pennsylvania allows resignation on 30 days' notice to the settlor (if living), all qualified beneficiaries and any co-trustees, unless the trust or a court sets other terms.

1. **Identify the trust**
   Exact trust name and date.
2. **Choose the effective date**
   30 days after notice, or another date allowed by the trust or with required consents.
3. **List who will receive notice**
   Settlor, qualified beneficiaries, and co-trustees.
4. **Sign before a notary**
   Bring a current photo ID, then send copies to everyone listed.

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

After It's Signed

- Turn over trust property and records to the successor trustee, who may sign an Acceptance of Trusteeship.

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

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RESIGNATION OF TRUSTEE

Commonwealth of Pennsylvania • 20 Pa.C.S. § 7765

Resigning trustee

Address

Name of trust

Date of trust

I resign as trustee of the trust named above, effective (check one):

☐ thirty (30) days after this notice is given, as provided in 20 Pa.C.S. § 7765(a)(1).

☐ on the following date, as permitted by the trust instrument or with the consent of all co-trustees and the persons required by law:

Effective date

Notice of this resignation is being given to (list the settlor, if living, all qualified beneficiaries, and any co-trustees):

The successor trustee designated in the trust instrument, if any, is:

Successor trustee name and address

I will deliver the trust property, records and an accounting of my administration to the successor trustee or co-trustee, and I remain responsible for protecting the trust property until it is delivered (20 Pa.C.S. § 7765).

X _____

Trustee signature

Date

Printed name

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

(Notary seal)

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

My commission expires

Commission number

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