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How to Complete Your Utah Disclaimer of Interest

Disclaimer of Property Interest (Utah Code 75-2-801)

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 county recorder of the county where the property is located. if it involves real estate.

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Need legal advice about this Utah document? Gavrilov & Brooks Law Firm has a Utah-licensed attorney, with attorneys licensed in other states as well. Phone and video consultations are available. **(916) 504-0529** · **www.gavrilovlaw.com**

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DISCLAIMER OF PROPERTY INTEREST

(Utah Uniform Disclaimer of Property Interests Act, Utah Code 75-2-801)

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 UTAH)
) ss.
COUNTY OF ____)

On this day

of (month and year)

before me, the undersigned notary public, personally appeared

name of disclaimant

proved on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to this instrument, and acknowledged that he/she/they executed the same. Witness my hand and official seal.

X

Notary Public

(Notary seal)

Notary's printed name

Commission number

My commission expires

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