

**DISCLAIMER OF INTEREST IN TRUST**  
(California Probate Code Sections §§ 260-295)

I, \_\_\_\_\_, state as follows:

I am a named beneficiary of the \_\_\_\_\_ TRUST (hereinafter, the “Trust”) created by \_\_\_\_\_, Settlor, pursuant to the terms of the \_\_\_\_\_ [e.g., SURVIVOR’S] TRUST under the Declaration of Trust dated \_\_\_\_\_, restated \_\_\_\_\_, 20\_\_\_\_.

The bequest to me in such Trust arises due to the death of \_\_\_\_\_ on \_\_\_\_\_ . The creator of the interest is \_\_\_\_\_.

I hereby disclaim my interest, as a beneficiary of the Trust, to any discretionary amounts of income earned by the Trust from the Trust’s ownership of any interest in the real property commonly known as \_\_\_\_\_, \_\_\_\_\_, County of \_\_\_\_\_, State of California (APN: \_\_\_\_\_), during the period of time that \_\_\_\_\_ [e.g., child of settlor where disclaimant is issue of child] is a beneficiary of such Trust.

This Disclaimer is made pursuant to sections 260 through 295 of the California Probate Code pertaining to disclaimer of interests.

DATED: \_\_\_\_\_.

\_\_\_\_\_  
X

*[Note: This is designed for use by, e.g., the issue of a child to disclaim an income interest where a trust grants trustee the discretion to sprinkle income to issue of a child, but child is the only one with an available parent/child exclusion (and so to avoid a reassessment trigger because of child’s issue’s income interest) – but not to disclaim any other future distributions of principal or income after child’s death or otherwise ceases to be a beneficiary for any other reason at which time the issue would presumably be next in line as beneficiaries.]*