

THIS BOOKLET CONTAINS THE  
FILING INSTRUCTIONS AND PUBLICATION UPDATE

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# California Wills & Trusts Forms

Publication 034-893      Release 19B

April 2006

## HIGHLIGHTS

### Trustee's Power to Make Gifts

- The trustee's gifting powers have been expanded to include gifts for educational and medical expenses under I.R.C. § 2503(e).

### Discharge of Support Obligations

- A provision prohibiting the discharge of the trustee's support obligation to a beneficiary from the trust estate has been added.

### Transfer of Certain Assets into Revocable Trust

- Information regarding transfer of U.S. Savings Bonds, Treasury accounts, and mobile homes into the revocable trust has been updated.

### Notary's Acknowledgment

- The acknowledgment has been changed to conform with new law.

**Trustee's Power to Make Gifts at Direction of Settlor(s) Expanded.** The forms set already includes a provision for the trustee's power to make annual exclusion gifts under I.R.C. § 2503(b). A trustee's power to make gifts for educational and medical expenses under I.R.C. § 2503(e) has been added. See **Alt. 4.90-1** and **Alt. 4.90-2**.

**New Alternative to Complete Prohibition on Discharge of Support Obligations.** The forms set already includes a complete prohibition of the discharge of support obligations; an alternative provision prohibiting the discharge of only the trustee's support obligation has been added. See new **Alt. 5.590-2** and **Alt. 70.560-2**.

**Social Security Numbers Removed.** In response to the increased threat of identity theft, the space for indicating the principal's Social Security number has been deleted from the Uniform Statutory Form Power of Attorney. See **DPA 4**. This information was also deleted from the long-form and short-form durable powers of attorney. See **DPA 1** and **DPA 2**.

Release 19B is completely up-to-date to reflect all significant 2005 state and federal rulings, regulations, and cases. Highlights of this release include:

**Trust Transfer Deed Modified.** The Trust Transfer Deed has been modified to include more information regarding exclusion from property tax reassessment and inapplicability of the document transfer tax. See **TFD 3.**

**Trust Transfer Documents Updated.** Information and documents regarding transfer of U.S. Savings Bonds, Treasury accounts, and mobile homes have been updated. See **TFD 26, TFD 27, and TFD 41.**

**Notary Acknowledgment.** The language of the certificate of acknowledgment has been changed to conform to a new law which requires that, beginning in 2006, the certificate of acknowledgment be in the exact form

set forth in Civil Code § 1189, rather than “substantially” in the form set forth therein. The form set forth in Civil Code § 1189 remained the same, but variations are no longer permitted.

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# **CALIFORNIA WILLS & TRUSTS**

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**Publication 034-893 Release 019B**

**April 2006**

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- 2. This Release Number 019B contains only White Revision pages.
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## **VOLUME 1**

### **Revision**

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<input type="checkbox"/>	1-340.1 . . . . .	1-340.1
<input type="checkbox"/>	1-360.2(3) . . . . .	1-360.2(3)
<input type="checkbox"/>	1-360.21 . . . . .	1-360.21
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### Revision

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