

IN THE MATTER OF) PROBATE COURT
THE REVOCABLE TRUST OF) OF SHELBY COUNTY, ALABAMA
RITA D. MENDEL Deceased)

DISCLAIMER OF INTEREST UNDER REVOCABLE TRUST

WHEREAS Rita D. Mendel, (the "Decedent") died on or about **June 24, 2021**, a resident of Shelby County, Alabama, and leaving various estate planning documents including a Last Will & Testament (the "Will") and the Rita D. Mendel Revocable Trust Agreement dated April 8, 2002 (the "Trust") which Trust remained revocable until the death of the Decedent; and

WHEREAS substantially all assets of the Decedent were previously transferred to the Trust during the Decedent's life, eliminating a need for the probate of the Decedent's Will or the opening of a probate estate; and

WHEREAS, the undersigned desires to irrevocably disclaim and renounce all rights and interests as a beneficiary under the terms of the Trust; and

WHEREAS, less than nine (9) months have elapsed since the date of death of the Decedent, the undersigned has not accepted any of the interests or benefits being disclaimed hereunder, and has not exercised any control as beneficial owner over any right or interest which he is disclaiming hereunder; and

WHEREAS, because of such disclaimer and renunciation, the property so being disclaimed shall pass without any direction on the part of the undersigned; and

WHEREAS, this instrument has been received by Jack M. Mendel, as Trustee of the Trust, not later than nine (9) months after the death of the Decedent.

NOW THEREFORE, I, **Jack M. Mendel**, (the "Disclaimant") do hereby forever, absolutely, irrevocably, and for no consideration, disclaim, relinquish, renounce, surrender, and release all my rights and interest under the Trust, including but not limited to the provisions of the Family Trust, as specified in Item VII(a) of the Trust, that were to be distributed to me as beneficiary under such Trust.

This instrument is intended to be a qualified disclaimer under section 2518 of the Internal Revenue Code and is to be governed by the laws of the State of Alabama.

In witness whereof, I have hereunto set my hand and seal this 27th day of AUGUST, 2021.


Jack M. Mendel, Disclaimant

STATE OF ALABAMA)
COUNTY OF SHELBY)

I, the undersigned, a notary public in and for said county, in said state, do hereby certify that **Jack M. Mendel**, an individual whose name is signed to the foregoing instrument, and who is known to me, acknowledged before me on this day, that, being informed of the contents of said instrument, he executed the same voluntarily on the day the same bears date.

Given under my hand and official seal, this the 27th day of AUGUST, 2021.


Notary Public MY COMMISSION EXPIRES MAY 11, 2025

RECEIPT BY TRUSTEE

I, Jack M. Mendel, as successor Trustee of the Rita D. Mendel Revocable Trust dated April 8, 2002, do hereby acknowledge receipt of and admit personal service upon me of the foregoing Qualified Disclaimer of Jack M. Mendel, individually, on this the 27th day of AUGUST, 2021.

Rita D. Mendel Revocable Trust dated April 8, 2002

By: 
Jack M. Mendel, Trustee



Filed and Recorded
-2- Official Public Records
Judge of Probate, Shelby County Alabama, County
Clerk
Shelby County, AL
09/01/2021 12:53:25 PM
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Alvin S. Bayl