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LEGACY LITIGATORS

Trust Beneficiary Rights in California:

What You Need to Know

If you're a beneficiary of a California trust, you have real, legally protected rights. This guide breaks down the basics, so you know what to expect and when it might be time to ask questions.

*This guide is for general informational purposes only and does not constitute legal advice. Every trust and situation is different; contact Fox Law to discuss your specific circumstances.

SECTION 1: YOUR RIGHT TO BE INFORMED

- ✓ You must be notified within 60 days after a trust becomes irrevocable
- ✓ That notice must include the trustee's name, contact info, and your right to request the trust document
- ✓ You can request a copy of the trust terms

Haven't heard from the trustee? That's a red flag worth looking into.

SECTION 2: YOUR RIGHT TO A FULL ACCOUNTING

- ✓ Trustees must provide an accounting at least once a year
- ✓ Also required when the trust ends or the trustee changes
- ✓ The accounting should show all assets, income, distributions, and fees

Vague answers or missing numbers? You're entitled to documentation.



SECTION 3: YOUR RIGHT TO FAIR TREATMENT

- ✓ Trustees can't play favorites among beneficiaries
- ✓ The trust terms must be followed as written
- ✓ This applies even when the trustee is also a family member

Feeling overlooked or treated differently? You're allowed to speak up.

SECTION 4: YOUR RIGHT TO TAKE LEGAL ACTION

- ✓ You can petition the probate court if a trustee isn't meeting their duties
- ✓ A court can compel an accounting, remove a trustee, or address financial harm
- ✓ You have the right to receive your inheritance within a reasonable timeframe

You don't have to just wait and hope things improve.

WHAT TO DO IF SOMETHING FEELS OFF

- Send a written request to the trustee (email or letter) and keep a copy
- Note dates and details of any communication (or lack of it)
- Reach out to a trust litigation attorney if you're not getting answers

CONTACT FOX LAW TODAY

Fox Law is a California law firm focused exclusively on trust and estate litigation. If something about your situation doesn't feel right, let's figure it out together! Contact us to schedule a no-cost consultation today:

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