

JUDICIAL IMPACT FISCAL NOTE

Bill Number: 5132 SB	Title: Trusts and Estates	Agency: 055 – Administrative Office of the Courts (AOC)
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Part I: Estimates

☐ **No Fiscal Impact**

Estimated Cash Receipts to:

	FY 2021	FY 2022	2021-23	2023-25	2025-27
Total:					

Estimated Expenditures from:

STATE	FY 2021	FY 2022	2021-23	2023-25	2025-27
FTE – Staff Years					
Account					
General Fund – State (001-1)					
State Subtotal					
COUNTY					
County FTE Staff Years					
Account					
Local - Counties					
Counties Subtotal					
CITY					
City FTE Staff Years					
Account					
Local – Cities					
Cities Subtotal					
Local Subtotal					
Total Estimated Expenditures:					

The revenue and expenditure estimates on this page represent the most likely fiscal impact. Responsibility for expenditures may be subject to the provisions of RCW 43.135.060.

Check applicable boxes and follow corresponding instructions:

☐ If fiscal impact is greater than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete entire fiscal note form parts I-V

☒ If fiscal impact is less than \$50,000 per fiscal year in the current biennium or in subsequent biennia, complete this page only (Part I).

☐ Capital budget impact, complete Part IV.

Legislative Contact:	Phone:	Date:
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Agency Approval: Ramsey Radwan	Phone: 360-357-2406	Date:
OFM Review:	Phone:	Date:

Part II: Narrative Explanation

This bill would adopt the Uniform Electronic Wills Act, the Uniform Fiduciary Income and Principal Act and the Uniform Powers of Appointment Act drafted by the National Conference of Commissioners on Uniform State Laws, in the State of Washington.

Part II.A – Brief Description of what the Measure does that has fiscal impact on the Courts

Part I – Would adopt the Uniform Electronic Wills Act which establishes procedures for the execution and filing of electronic wills. This bill retains will core formalities of writing, signature and attestation but makes them executable electronically. The electronic will must be:

- A record that is readable as text at the time of signing
- Signed by the testator or the testator's representative in the testator's physical presence and by the testator's direction.
- Signed by at least two competent witnesses at the testator's direction in the physical or electronic presence of the testator.

Part II – Would adopt the Uniform Fiduciary Income and Principal Act updating and expanding the Washington Principal and Income Act of 2002. It would adapt changes in the design and use of trusts expanding the use of the power of the Trustee to adjust between income and principal if the Trustee determines it is necessary to administer the trust or estate.

Part III – Would adopt the Uniform Powers of Appointment Act (UPAA). This act would codify the law of powers of appointment used by estate planners to give a third party the authority to direct the disposition of a donor's property to specified recipients.

Part IV – Would expand and clarify the reasons why a party may petition the court to remove a personal representative or withdraw nonintervention powers. This section also outlines the powers of a personal representative.

II.B - Cash Receipt Impact

None

II.C – Expenditures

This bill would require judicial education and court clerk instructions and would be managed within existing resources.

Part III: Expenditure Detail

III.A – Expenditures by Object or Purpose

	FY 2021	FY 2022	2021-23	2023-25	2025-27
FTE – Staff Years					
A – Salaries & Wages					
B – Employee Benefits					
C – Prof. Service Contracts					
E – Goods and Services					
G – Travel					
J – Capital Outlays					
P – Debt Service					
Total:					

III.B – Detail:

Job Classification	Salary	FY 2021	FY 2022	2021-23	2023-25	2025-27
Total FTE's						

Part IV: Capital Budget Impact

None.

Part V: New Rule Making Required

None.