

**The below table is a guide for most situations.  
This information may change due to specific state laws or changes.**

<b>OWNERSHIP CHANGE (Situations)</b>	<b>REQUIRED DOCUMENT(S)</b>
An individual's name changes due to marriage, divorce, etc.	Marriage Certificate, Divorce Decree reinstating maiden name, Other document affecting name change
Company or corporation changes its name	Certificate of Name Change including W9
Company or corporation's name changes due to merger	Certificate of Merger including W9
Appointment of Attorney-in-Fact	Copy of Power of Attorney
Purchase or sale of interest	Conveyance filed of record in the county in which the property is located
Ownership Change Due to Divorce	Complete Divorce Decree including Settlement Agreement and, if appropriate, recorded conveyances
Trust or partnership is created	Trust or Partnership Agreement and, if appropriate, a recorded document conveying the interest in property to a Trust or Partnership
Trust or partnership is terminated	Dissolution of Trust or Partnership and, if appropriate, recorded conveyances to beneficiary
Changes in trustee(s)	Instrument whereby the successor trustee was appointed
Joint Tenancy and One Dies	Copy of the Death Certificate of the Joint Tenant and W9 for the surviving tenant
Owner died with a will (testate) and probate proceedings are to be conducted in the state where the property is located	<ul style="list-style-type: none"> <li>• Death Certificate</li> <li>• Order Admitting Will to Probate in county where property is located</li> <li>• Letters Testamentary</li> <li>• Last Will and Testament</li> <li>• Evidence debts and taxes have been paid</li> <li>• Final Decree of Distribution or Judgment of Possession in county where property is located</li> </ul>
Owner died with a will (testate) and probated proceedings are to be conducted in a state other than where the property is located	<ul style="list-style-type: none"> <li>• All above requirements listed in box above</li> <li>• Documentation of ancillary probate proceedings opened in all affected states in which property is located or Affidavit of Heirship</li> </ul>
Owner died without a will (intestate)	<ul style="list-style-type: none"> <li>• A copy of the death certificate</li> <li>• Completed Affidavit of Heirship Form (This form must be completed by a disinterested person acquainted with the facts (not a close relative). This must be witnessed and notarized. The form must be recorded in all counties where interests are owned by the decedent. Transfer by Affidavit of Heirship is according to the state's law of Descent and Distribution where the property is located. Contact us for the correct form.</li> </ul>
Bankruptcy – Chapter 11 or 7	<ul style="list-style-type: none"> <li>• Order from Bankruptcy Court designating to whom payment should be made</li> </ul>