

# **OWNERSHIP CHANGE REQUIREMENTS**

## **Personal Name Change**

- Marriage – Copy of marriage certificate
- Divorce – Copy of divorce decree reinstating maiden or prior name
- Legal Change – Court order evidencing name change

## **Corporate Name Change**

- Merger/Name Change – Certificate of Merger and Tax ID number
- LLC Name Change – Certificate evidencing name change

## **Trust/Partnership Change**

- Trust Created – Recorded conveyance of interest to the Trustee and/or Trust or Partnership Agreement
- Change of Trustee (Death) – Recorded instrument evidencing death of Trustee and appointment of Successor Trustee
- Change of Trustee (Resignation) – Recorded instrument evidencing Trustee resignation and appointment of Successor Trustee
- Change of Trustee (Appointment) – Copy of Trust Agreement or Memorandum of Trust
- Trust/Partnership Terminations – Dissolution of Trust or Partnership and conveyance to beneficiary or partners

## **Death of an Owner (Owner Died with a Will; Testate)**

- Certified copies of Probate proceedings should be filed in the county where the property is located. Submit certified copies of Last Will and Testament, Order Admitting Will to Probate, Letters Testamentary and disclaimers if any.
- If probate proceedings have not been filed, submit certified copies of the Death Certificate, Last Will and Testament and a properly executed and recorded Affidavit of Heirship completed by the disinterested third party.

## **Death of an Owner (Owner Died without a will; Intestate)**

- Certified copies of Probate proceedings should be filed in the county where the property is located. Submit certified copies of Death Certificate and Administration Proceedings.
- If probate proceedings have not been filed, submit certified copies of the Death Certificate and a properly executed and recorded Affidavit of Heirship completed by the disinterested third party.

## **Purchase or Sale of Interest**

- Purchase of Interest – Recorded conveyance evidencing acquisition of property
- Sale of Interest – Recorded conveyance evidencing sale of property