



Change of Ownership

Listed below are some of the more common situations resulting in either change of ownership or change to the owner status. The bolded heading describes the situation the bullet point reflects document(s) required to effect the change. (There may be some differences in the requirements due to laws in particular jurisdictions.) All changes can be submitted in writing or emailed to our owner relations address

Sale of an Interest

- Conveyance filed of record in the county/parish in which the property is located

Ownership Change Due to Divorce

- Completed Divorce Decree including Settlement Agreement or recorded conveyance (if appropriate)

Trusts/Partnerships

Ownership by Trust/Partnerships

- Trust or Partnership Agreement, recorded document conveying the interest in property to the Trust/Partnership

Distribution from Trusts/Partnerships

- Dissolution of Trust or Partnership, if Dissolution of Trust or Partnership, if applicable, and recorded conveyances to beneficiaries

Changes in Trustee

- Instrument appointing successor trustee

Passing of Joint Tenant

- Death Certificate of Joint Tenant

Estate Proceedings

Owner died with a Will (testate)

Probate proceedings conducted in the state where the property is located

- Death Certificate
Order Admitting Will to Probate
Letters Testamentary
Last Will and Testament
Evidence of payment of debts and taxes
Final Decree of Distribution or Judgment of Possession



Owner died with a Will (testate)

Probate proceedings conducted in a state other than the state where the property is located

- All the documents listed directly above, plus
Documentation of ancillary probate proceedings opened in all affected states, or Affidavit of Heirship

Owner died without a Will (intestate)

(Laws of Descent and Distribution will apply as relevant)

- Death Certificate
Letters of Administration
Affidavit of Heirship
Evidence of payment of debts and taxes

Bankruptcies

Chapter 11

- Plan of Reorganization
Order Confirming the Plan of Reorganization

Chapter 7

- Order Naming Trustee of Bankruptcy Estate

- All payees are required to provide SSN (social security number) or Tax ID (identification) #; otherwise Federal Law requires 31% withholding tax.
- All documents effecting change of ownership must be filed of record in the county where property is located.
Please retain your check details for future reference