



Change of Name or Ownership Request

Owner Number: _____ Date: _____

Owner Name(s): _____

Email: _____

Telephone Number: _____

Old Name/Address:

New Name/Address:

Owner Signature & Title (**Required**)

Date

SSN / Tax ID

*Second Owner Signature & Title (**Required – if applicable**)

Date

SSN / Tax ID

*** If more than one owner name appears on the account, all owners must sign.**

Requested Change Type	Required Documentation
Name Change (for Individuals)	<ul style="list-style-type: none"> • Marriage Certificate, Divorce Decree or other documentation effecting name change
Name Change (for Companies)	<ul style="list-style-type: none"> • Certificate of Merger or Name Change • Executed Form W-9
Interest Owner Death – Testate (with a will)	<ul style="list-style-type: none"> • Death Certificate • Copy of Will/Order admitting Will to probate in the county records where the property is located • Copy of Trust documents, if one was created through the will • Letters Testamentary or Administration • Evidence stating all taxes have been paid related to the Estate
Interest Owner Death – Intestate (without a will)	<ul style="list-style-type: none"> • Death Certificate • Affidavit of Death and Heirship Form • Evidence of all debts and taxes being paid
Conveyance of Interest	<ul style="list-style-type: none"> • Copy of recorded instrument proving the interest was conveyed to a different party

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