

NAME CHANGE – PERSONAL

- **Marriage**
 - Copy of marriage certificate
 - **Divorce**
 - Copy of divorce decree reinstating maiden name or prior name
 - Copy of final order/decreed showing distribution of assets
 - Copies of any court-mandated conveyance documents
 - **Legal Name Change**
 - Court order evidencing name change
 - **Appointment of Attorney-In-Fact**
 - Copy of power of attorney
 - **Appointment of Agent or Agency**
 - Copy of agency agreement
 - **Appointment of Legal Guardian**
 - Copy of birth certificate or court order designating guardianship
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NAME CHANGE – COMPANY / CORPORATE, LLC

- **Merger / Name Change**
 - Certificate of merger and tax ID number
 - **LLC Name Change**
 - Certificate evidencing name change
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PURCHASE / SALE OF INTEREST

- **Purchase of Interest**
 - Recorded copy of conveyance evidencing acquisition of property
- **Sale of Interest**
 - Recorded copy of conveyance evidencing sale of property

TRUSTS / PARTNERSHIP CHANGE

- **Trust or Partnership Created**
 - Copy of recorded conveyance of interest to the Trustee and/or Trust or Partnership
 - Trust or Partnership Agreement
- **Change of Trustee – Death**
 - Copy of recorded instrument evidencing death of Trustee
 - Appointment of Successor Trustee
 - Copy of the Trust Agreement
- **Change of Trustee – Resignation**
 - Copy of recorded instruments evidencing Trustee resignation
 - Appointment of Successor Trustee
 - Copy of Trust Agreement
- **Change of Trustee – Appointment (Original or Succession)**
 - Copy of Trust Agreement or recorded Memorandum of Trust
- **Trust or Partnership is Terminated**
 - Copy of Trust Agreement or recorded Memorandum of Trust
 - Copy of Dissolution of Trust or Partnership
 - Conveyance to beneficiary or partners

DEATH OF CO-OWNER

- **Joint Tenant (with Rights of Survivorship)**
 - Certified copy of Death Certificate of deceased joint tenant
- **Tenants by Entirety**
 - Certified copy of Death Certificate of deceased joint tenant
- **Life Tenant**
 - Certified copy of Death Certificate of deceased life tenant
 - Recorded instrument creating the life estate
 - Names, addresses, and tax identification numbers of remaindermen

- **Tenant in Common**
 - Copies of pertinent "Death of Owner" documents (described below)
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DEATH OF OWNER – WITH A WILL (TESTATE)

- **Probate proceedings pending**
 - Certified copy of Last Will and Testament
 - Certified copy of Order Admitting Will to Probate
 - Certified copy of Letters Testamentary
 - **Probate proceedings complete**
 - Certified copy of Final Decree
 - Certificate of Transfer or other documentation evidencing final distribution
 - **Probate not filed**
 - Certified copy of Death Certificate
 - Certified copy of Last Will and Testament
 - Properly executed and recorded Affidavit of Heirship (signed or witnessed by an uninterested third party)
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DEATH OF OWNER – WITHOUT A WILL (INTESTATE)

- **Probate proceedings pending**
 - Certified copy of Death Certificate
 - Certified copy of Administration Proceedings
 - **Probate proceedings complete**
 - Certified copy of Final Decree
 - Certificate of Transfer or other documentation showing distribution under laws of descent
 - **Probate not filed**
 - Certified copy of Death Certificate
 - Properly executed and recorded Affidavit of Heirship (signed or witnessed by an uninterested third party)
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