

## **Situation**

## **Required Documentation**

Address or Bank Change	<i>Submit change request in writing with your signature</i>
Name change due to Marriage or Divorce	<i>Marriage Certificate, Divorce Decree Reinstating maiden name or other document affecting name change</i>
Company or corporation changes its name	<i>Certificate of Name Change including Tax ID</i>
Company or corporation change due to a merger	<i>Certificate of Merger including Tax ID</i>
Appointment of Attorney-in-Fact	<i>Copy of Power of Attorney</i>
Sale of Interest	<i>Conveyance document filed of record in county or parish where the property is located</i>
Ownership change due to Divorce	<i>Complete Divorce Decree including Settlement Agreement and recorded conveyances</i>
Trust or Partnership is created	<i>Trust or Partnership Agreement and appropriate recorded document conveying the interest in the property to a Trust or Partnership</i>
Trust or Partnership is terminated	<i>Dissolution of Trust or Partnership and, if appropriate recorded conveyance to beneficiary(s)</i>
Change in Trustee	<i>Instrument appointing successor trustee</i>
Joint Tenancy and one dies	<i>Death Certificate</i>
Bankruptcy Chapter 11	<i>Plan of Reorganization, Order Confirming Plan of Reorganization</i>
Chapter 7	<i>Recorded Conveyance (as appropriate) , Order Naming Trustee of Bankruptcy Estate</i>

All payees are required to provide a social security or tax identification number. All changes of ownership must be filed in the County/Parish where the property is located. Address changes cannot be handled by phone. A written request is required. Always retain your check detail for future reference.