

OWNERSHIP CHANGES

Documents We Require To Make Changes To Ownership Information

Name Change

Individual:

- Copy of Marriage Certificate
- Divorce Decree reinstating maiden name
- Other documents affecting a name change filed of record in the county/parish where the property is located

Company or Corporation:

- Certificate of Name Change and Form W-9
- Certificate of Merger and Form W-9

Appointment of Attorney-in-Fact:

- Copy of Power of Attorney

Transfer of Interest

Sale of Interest

- Copy of Conveyance filed of record in the county/parish where the property is located
- Form W-9 completed by new owner

Trust/Partnership Change

Trust or Partnership is created:

- Trust or Partnership Agreement
- Recorded document conveying the interest in property to a Trust or Partnership
- Statement of Authority evidencing that the Trustee had authority as of the date on which the conveyance was executed filed of record in the county/parish where the property is located
- Form W-9 completed by new owner

Trust of Partnership is terminated:

- Dissolution of Trust or Partnership Agreement
- Recorded document conveying the interest to beneficiary (For properties in Louisiana, must also furnish a copy of the Extract of Trust filed of record in the parish where the property is located).
- Form W-9 completed by new owner

Change of Trustee:

- Instrument whereby successor Trustee was appointed

Divorce

- Complete Divorce Decree including Settlement Agreement
- Conveyance filed of record in the county/parish where the property is located

Death of Owner (Estate Proceedings)

If the decedent had a Will (testate) and probate proceedings are to be conducted in the state where the property is located, all of the following documents are required:

- Copy of Death Certificate
- Last Will and Testament
- Order admitting Will to Probate in county/parish where property is located
- Letters Testamentary
- Final Decree of Distribution or Judgement of Possession in county/parish where property is located
- Form W-9 completed by devisees

If the decedent had a Will (testate) and probate proceedings are to be conducted in a state other than where the property is located, all of the following documents are required:

- Copy of Death Certificate
- Last Will and Testament
- Order admitting Will to Probate in county/parish where property is located
- Letters Testamentary
- Final Decree of Distribution or Judgement of Possession in the county/parish where property is located
- Documentation of Ancillary Probate Proceedings opened in the county/parish where property is located or Affidavit of Heirship
- Form W-9 completed by devisees

If the decedent died without a Will (intestate) and the Estate is under administration (Laws of Descent and Distribution will apply as relevant):

- Copy of Death Certificate
- Letters of Administration
- Affidavit of Heirship completed by a disinterested person acquainted with the facts (not a close relative). This form must be filed of record in the county/parish where the property is located.
- Final Decree when available
- Conveyance from Administrator filed of record in the county/parish where the property is located
- Form W-9 completed by heirs

Bankruptcy

- Order from Bankruptcy Court designating to whom payment should be made
- Form W-9 for recipient of payment