



CHANGE IN OWNERSHIP

SITUATION	REQUIRED DOCUMENTS
SALE OF AN INTEREST:	
Sale of an interest	Conveyance filed of record in the county/parish in which the property is located
NAME CHANGES:	
Individual's name change	Marriage Certificate
Name change due to a divorce	Divorce Decree including Settlement Agreement and recorded conveyance (if applicable)
Company or Corporation changes its name	Certificate of Name Change including Tax ID (IRS Form W-9)
Company or Corporation's name changes due to a merger	Certificate of Merger including Tax ID (IRS Form W-9)
Appointment of Attorney-in-Fact	Copy of Power of Attorney
TRUSTS/PARTNERSHIPS:	
Trust or Partnership is created	Trust or Partnership Agreement and, if appropriate, recorded document conveying in the interest in a property to a Trust or Partnership
Trust or Partnership is terminated	Dissolution of Trust or Partnership and, if appropriate, recorded conveyances to beneficiary.
Changes in Trustee	Instrument whereby the successor trustee was appointed and, if applicable, the copy of the trustee resignation.
LIFE ESTATE	
If tenant dies	Death Certificate of Life Tenant and names and addresses of remaindermen.
JOINT TENANCY:	
If one dies	Death Certificate of deceased.
ESTATE PROCEEDINGS:	
Owner died with a will (testate) and probate proceedings are to be conducted in the state where the property is located	Application to probate the will Last Will and Testament Order Admitting Will to Probate Letters Testamentary Signed oath of the independent executor Evidence debts and taxes have been paid Final Decree of Distribution or Judgment of Possession Death Certificate
Owner died with a Will (testate) and probate proceedings are to be conducted in a state other than the state where the property is located (Ancillary Probate)	Certified copy of Last Will and Testament Order or Decree Admitting Will to Probate Final Decree of Distribution or Judgment of Possession Documentation of ancillary probate proceedings opened in all affected states or Affidavit of Heirship Letters Testamentary Evidence debts and taxes have been paid Death Certificate
Owner died with a Will (testate) and Real Property; Muniment of Title (Texas only)	Certified copy of Last Will and Testament Order Admitting Will to Probate as a Muniment of Title Evidence debts and taxes have been paid Death Certificate
Owner died without a Will (intestate) and probate was initiated. (Laws of Descent and Distribution will apply as relevant)	Death Certificate Letters of Administration Evidence debts and taxes have been paid Affidavit of Heirship Names and addresses of beneficiaries Life Tenant's Death Certificate
Owner died with or without a will and no probate was initiated. Estate is treated as intestate, and Laws of Descent and Distribution will apply as relevant.	Death Certificate Affidavit of Heirship (recorded where property is located) Names and addresses of heirs
BANKRUPTCY:	
Chapter 7	Recorded conveyance (as appropriate) Order Naming Trustee of Bankruptcy Estate
Chapter 11 Chapter 13	Plan of Reorganization Order Confirming the Plan of Reorganization