

## Address Change

- Submit request in writing (form available upon request)

## Appointment of Attorney-in-Fact

- Copy of Power of Attorney

## Bankruptcy

### 1. Chapter 11 (Debtor in possession)

- Plan of Reorganization
- Order Confirming the Plan of Reorganization

### 2. Chapter 7

- Appropriate conveyance document filed and recorded in all counties, parishes or districts in which property is located

## Change of Ownership Due to Divorce

- Court certified divorce decree including Settlement Agreement
- Appropriate conveyance document filed and recorded in the county, parish or district in which the property is located

## Guardianship

### 1. Owner declared incompetent

- Court issued Letter of Guardianship naming Guardian

### 2. Owner, previously "a minor" reaches legal age

- Copy of birth certificate

## Joint Tenants\*

- Death certificate. Also provide completed W9 and mailing address for surviving tenant.

**\*Interest Is Owned as Joint Tenants with Right of Survivorship and one tenant dies**

## Estate Proceedings\*\*

*1. Owner dies testate (with a will) and probate proceedings are to be conducted in the same state in which the property is located*

*If probate is not complete, please provide copies of the following:*

- Certified Death Certificate
- Order Issuing Letters Testamentary
- Order Admitting the Will to Probate
- Last Will and Testament

*When probate is completed:*

- Evidence debts and taxes have been paid
- Court certified Final Decree of Distribution
- Appropriate recorded conveyance documents

*2. Owner dies testate (with a will) and probate proceedings are to be conducted in a state other than the state(s) in which the property is located (Where applicable\*\*)*

*All of the above in addition to the following:*

- Ancillary Probate proceedings will be required in every state in which the deceased owned property
- Court Order admitting Foreign Will to Probate
- Appropriate conveyance documents filed and recorded in all counties, parishes or districts in which property is located

*3. Estate not probated or owner dies intestate (without a will)*

- Certified Death Certificate
- Order issuing Letters of Administration
- Completed Affidavit of Heirship filed and recorded in the county, parish or district in which property is located (state laws of descent and distribution based on property location will apply). Affidavit of Heirship form available upon request.
- If available, Court Order Determining Heirship

**\* Please note that document requirements for Estate Proceedings vary by state. Contact Boaz Rockies Operating, LLC for further information on Estate Proceeding documentation.**

## Life Estate Owner Dies

- Copy of certified death certificate for Life Estate Owner
- Names and addresses of remaindermen
- Completed W-9 of remaindermen

## Name Changes

### 1. Individual name changes due to marriage or divorce

- Court certified copy of marriage certificate or divorce decree reinstating maiden name or other court certified document reflecting name change

### 2. Company or Corporation Name Change

- Certificate of Name Change
- Completed W-9

### 3. Company or Corporation name change due to merger

- Certificate of Merger
- Completed W-9

## Purchase or Sale of Interest

- Assignment, Conveyance, Deed or Purchase and Sale Agreement which has been filed and recorded in the county, parish or district in which the property is located

## Trusts

### 1. Trust is created

- Copy of Trust Agreement
- Copy of appropriate conveyance document, filed and recorded in the county, parish, or district in which the property is located, transferring interest(s) to the trust
- Completed W-9

### 2. Change in Trustee

- Document evidencing appointment of Successor Trustee

### 3. Trust is terminated

- Copy of Dissolution of Trust
- Appropriate conveyance document filed and recorded in the county, parish or district in which the property is located
- Completed W-9(s) for grantee(s)