

OWNERSHIP CHANGES

- It is the owner's responsibility to notify as to any ownership or status changes to reflect current record title.
- Requests must be received in writing, accompanied by a recorded conveyance document from the record title owner.
- The conveyance must clearly describe the property to be transferred, along with the conveyance recording information for the county in which the property is located. Please include the following information:
 - Name of current owner and owner number, if available
 - A copy of the recorded conveyance, assignment or deed
 - Your name, address and social security number or tax ID number
 - A phone number including area code, where the contact person can be reached during the day
 - Email address, if available
- All new payees are required to submit a completed IRS Form W-9 with evidence of a valid SSN or TIN.
- Original documents will not be returned; send a COPY (or copies) of the documents requested.

All ownership change requests and associated documentation should be directed to:

Attn: Troy Owner Relations
C/O EAG 1Source/Pepper Well
448 W. 19th St, Ste 102
Houston TX 77008

OR

Troy-Ownerrelations@eag1source.com

Below is additional guidance regarding specific documentation required for different types of ownership changes.

1) Name Changes

Personal:

- Marriage: Copy of Marriage Certificate
- Divorce: Copy of Divorce Decree reinstating maiden name or prior name
- Legal Name Change: Court documentation supporting name change

Company:

- Certificate of Name Change

Merger:

- Certificate of Merger and tax ID number
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2) Trust or Partnership Changes

Creation of a Trust or Partnership:

- Trust or Partnership Agreement and subsequent Amendments
- Recorded conveyance(s) to the Trust or Partnership

Termination of a Trust or Partnership:

- Trust or Partnership Agreement and subsequent Amendments
- Dissolution of Trust or Partnership
- Recorded conveyance(s) to beneficiaries or partners

Change of Trustee:

- Due to Death
 - o Certificate of Death of current Trustee and document appointing Successor Trustee(s)
 - o Trust Agreement and subsequent Amendments
 - Due to Resignation
 - o Recorded document stating resignation of current Trustee and appointment of Successor Trustee(s)
 - o Trust Agreement and subsequent Amendments
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3) Death of Owner

Owner died with a Will (Testate) and Estate has been probated in state where property is located:

- Certificate of Death for Owner
- Copy of Last Will and Testament
- Order Admitting Will to Probate
- Letters of Testamentary
- Evidence of debt and taxes being paid
- Final Decree and/or Certificate of Transfer

Owner died with a Will (Testate) and Estate will not be probated:

- Certificate of Death for Owner
- Copy of Last Will and Testament
- An Affidavit of Heirship properly completed and notarized. It should be executed by one disinterested party and recorded in the county where this property is located.

Owner died without a Will (Intestate) and the Estate has been administrated (Laws of Descent and Distribution will apply as relevant):

- Certificate of Death for Owner
- Certified copy of administration of proceedings
- Evidence of debt and taxes being paid
- Final Decree and/or Certificate of Transfer

Owner died without a Will (Intestate) and no administration will occur:

- Certificate of Death for Owner
- An Affidavit of Heirship properly completed and notarized. It should be executed by one disinterested party and recorded in the county where this property is located

Owner having a life estate dies:

- Certificate of Death for Owner
- Copy of Deed creating Life Estate
- Name(s), Address(es) and Tax ID number(s) for Remainderman/Remaindermen

Joint Tenancy ownership and one tenant dies:

- Certificate of Death for Owner
 - Copy of Deed creating Joint Tenancy
 - Recorded Affidavit of Surviving Spouse or Joint Survivor
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4) Sale of Interest

- Conveyance filed of record in the county in which the property is located
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Appointments of Attorney-in-Fact or Agent

- Copy of Power of Attorney
- Copy of Agency Agreement