



TRANSFERS OF OWNERSHIP

In order to honor a request for a change or transfer of ownership, we will need copies of the applicable documents listed below.

TRANSFER FROM:

TRUST TO A TRUST:

- A copy of a Deed, executed by the Trustee(s), which establishes the transfer of ownership from the Trust to the new Trust, along with the Trust Agreements. Deed must be recorded in ALL counties where the properties are located.

TRUST TO AN INDIVIDUAL(S):

- A copy of a Deed, executed by the Trustee(s), which establishes the transfer of ownership from the Trust to the individual(s), along with the Trust Agreement. Deed must be recorded in ALL counties where the properties are located.

INDIVIDUAL TO A TRUST:

- A copy of a Deed which establishes the transfer of ownership from an individual to a Trust. Deed must be recorded in ALL counties where the properties are located.

INDIVIDUAL TO ANOTHER INDIVIDUAL(S):

- A copy of a Deed which establishes the transfer of ownership from the current owner to the new individual(s). Deed must be recorded in ALL counties where the properties are located.

CHANGE OF TRUSTEE OF A TRUST:

- If the Trustee is deceased - A copy of the Certificate of Death and a copy of the Trust Agreement. Additional documentation may be required.
- If the Trustee is not deceased - A copy of the Trust Agreement and a copy of the documentation required by the Trust Agreement to change the Trustee.

DEATH OF A JOINT TENANT:

- A copy of the Certificate of Death and a copy of the Affidavit of Death of Joint Tenant. Affidavit of Death of Joint Tenant must be recorded in ALL counties where the properties are located.

DECEASED INDIVIDUAL TO THEIR ESTATE:

- A copy of the Letters Testamentary, the Estate's new Taxpayer Identification Number (if applicable), the Certificate of Death, and any change of mailing address for the Estate.

A DECEASED INDIVIDUAL'S ESTATE TO THEIR BENEFICIARY (IES):

• **RESIDED IN CALIFORNIA:**

- Certificate of Death
- Letters Testamentary
- Copy of Probated Last Will & Testament
- All Final Probate documents issued by courts, filed of record in ALL counties where the properties are located and recorded in ALL counties where the properties are located
- Contact information for all heirs, including their Tax Identification Numbers

• **RESIDED OUTSIDE OF CALIFORNIA:**

- Certificate of Death
- Letters Testamentary
- Copy of Probated Last Will & Testament
- Authenticated copy of all Ancillary Probate Proceedings, filed of record in ALL counties where the properties are located and recorded in ALL counties where the properties are located
- Contact information for all heirs, including their Tax Identification Numbers

Additional Ways to Transfer Interest: There may be other ways to transfer your interest while avoiding the process of probate, such as a Court Order Determining Succession to Property under California Probate Code sec. 13150 ("13150") or an Affidavit re Real Property of Small Value under California Probate Code sec. 13200 ("13200"), et cetera; however, we do recommend that you seek an attorney to better assist you with all the options available to you. The 13150 and 13200 must be recorded in ALL counties where the properties are located. We do not accept Affidavits re Collection or Transfer of Personal Property under California Probate Code sec. 13100. Additionally, please note that in lieu of a copy of the Trust Agreement, we will accept a Certification of Trust under California Probate Code sec. 18100.5.

W9, 587, and 590

Enclosed please find a Form W-9, 587, and 590. The Form 587 is for Non-California residents and the Form 590 is for California residents. Please complete the Form W-9 and either the Form 587 or Form 590 and return. **Please note:** Without a completed Form W-9 and accurate tax identification number, we will have to withhold a 24% federal tax from your payments. **Please note:** Without completed Form 590, we will have to withhold a 7% state tax from California residents with a P.O. Box. Non-California residents will have a 7% state tax withheld, unless the Owner turns a Form 588 into the State of California, the State of California grants the Owner's waiver request, and the Owner sends a copy of the letter to CRC.

Electronic Funds Transfer (EFT) Form

Also, enclosed please find our Electronic Funds Transfer (EFT) Form. If you would like to receive any future payments via direct deposit, then please complete the Enrollment Form and return. Please note that you will need to provide a copy of a voided check with the returned EFT Form.

If you have any questions, please feel free to contact our office at 855.272.5519 or by email at crc@ownerrelationsupport.com.