

INSTRUCTIONS FOR ESTATES

Owner # _____ Name: _____

Below are most common for ownership changes:

If the estate is *not probated* and there is *NO Will*, please furnish:

- a copy of the Death Certificate
- an Affidavit of Death and Heirship form completed by a person who was acquainted with the deceased. The affiant's signature should be witnessed by two parties, notarized, and then recorded in the county where the property(s) is located.

If the estate is *not probated* and there is a *Will*, please furnish:

- a copy of the Will
- a copy of the Death Certificate
- an Affidavit of Death and Heirship form completed by a person who was acquainted with the deceased. The affiant's signature should be witnessed by two parties, notarized, and then recorded in the county where the property(s) is located.

If the estate is *probated* and there is a *valid Will that will not be filed*, please furnish:

- a copy of the Death Certificate
- a self-proving affidavit
- a copy of the recorded probate and Letters Testamentary or Letters of Administration.
- a copy of the recorded Final Decree (or like document) when it becomes available, along with addresses and social security numbers of the beneficiaries.

If the estate is *probated* and there is a *Will*, please furnish:

- a copy of the Will
- a copy of the Death Certificate
- a copy of the *recorded* Order Admitting Will to Probate, and Letters Testamentary or Letters of Administration.
- If the decedent died in a county other than where the property is located, the probated Will should be **recorded in the county where the property is located.**
- a copy of the recorded Final Decree (or like document) when it becomes available, along with addresses and social security numbers of the beneficiaries.

If the transfer is going to a Trust, please furnish:

- a copy of Trust Agreement and appropriate **recorded** document conveying the interest to the trust.

Payments may be made directly to the estate if we are provided with a copy of the Letters Testamentary or Letters of Administration and the Taxpayer Identification Number of the Estate.