

Helpful Hints

Changes affecting payment from Stephens & Johnson Operating Co.

There may be some changes in our requirements due to the laws of each State. If you are in doubt or require additional information relating to your particular set of circumstances, please contact our office.

For the most efficient response, these questions should be submitted in writing to owner.relations@sjoc.net

Situation and Documentation (*) required by our office to affect the changes

SALE OF ANY INTEREST

- * A copy of the appropriate conveyance filed of record in each county in which the property is located

ESTATE PROCEEDINGS

1. Owner died with a will (testate) and probate proceedings are to be conducted in the same state in which the properties are located
When probate is complete

- * Certified copy of Last Will and Testament
- * Order Admitting Will to Probate
- * Letters Testamentary
- * Final Decree of Distribution (if appropriate)
- * Recorded conveyances (if appropriate)
- * Copy of Death Certificate

2. Owner died with a Will (testate) and probate proceedings are to be conducted in a state other than the state in which the property is located
* Documents of ancillary probate proceedings in all effected states (Requirements vary according to states)

- * Recorded conveyances (if appropriate)

* Copy of Death Certificate

3. Owner died without a Will (intestate)

- * Affidavit of Heirship (individual state laws of Descent and Distribution will apply as relevant)
- * Recorded conveyance (if appropriate)
- * Copy of Death Certificate for decedent and any deceased heirs

NAME CHANGES

1. An individual's name change due to marriage, divorce, etc.

- * Copy of marriage certificate, divorce decree reinstating maiden name or other document affecting a name change

2. Company or corporation changes its name only

- * Certificate of Name Change (Tax ID should be included)

3. Company or corporation's name changes due to a merger

- * Certificate of Merger (Tax ID should be included)

4. Attorney-in-fact appointed

- * Copy of Power of Attorney

TRUST

1. Trust is created

- * Copy of Trust Agreement and recorded document conveying the property interest to trust in the county clerk's office where the interest is held

2. Trust is terminated

- * Copy of dissolution of Trust and recorded conveyance to beneficiary

3. Change of Trustee - Death

- * Copy of recorded instrument evidencing death of Trustee and appointment of Successor Trustee

* Copy of the Trust Agreement

4. Change of Trustee - Resignation

- * Copy of recorded instruments evidencing Trustee resignation, appointment of successor Trustee and a copy of Trust Agreement

5. Change of Trustee - Appointment (Original or Succession)

- * Copy of Trust Agreement or recorded Memorandum of Trust

CHANGES OF OWNERSHIP DUE TO DIVORCE

- * Copy of complete Divorce Decree including Settlement Agreement

- * Recorded conveyance (if appropriate)

BANKRUPTCY

1. Chapter 11

- * Plan of reorganization, Order confirming the plan of Reorganization

2. Chapter 7

- * Recorded conveyances as appropriate

OWNER WITH A LIFE ESTATE DIES

- * Copy of life tenant's death certificate

- * Names and addresses of remaindermen (if additional documentation is required, you will be notified)

INTEREST IS OWNED AS JOINT TENANTS & ONE DIES

- * Copy of death certificate of joint tenant

Please note that proper title succession must be filed in the county clerk's office where the property is located.