

## CHANGE OF OWNERSHIP DOCUMENTATION REQUIREMENTS

### Reason for Account Change

### Documents Required

#### Sale of Interest

1. Royalty Interest (RI); Overriding (OR) or Working Interest (WI)

Copy of appropriate conveyance recorded in the county in which the property is located (State and Federal interests require filing agency appropriate forms for approvals)

#### Estate Proceedings

1. Owner dies testate (with a will) and probate proceedings are to be conducted in the same state in which the properties are located
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 properties are located
3. Owner dies intestate (without a will)

Copy of Last Will & Testament  
Order Admitting Will to Probate  
Letters Testamentary  
Evidence debts and taxes are paid  
Final Decree of Distribution (if appropriate)  
Appropriate recorded conveyance

Ancillary Probate proceedings will be required in every state in which the deceased owned property  
**Texas:** Exemplified copy of the foreign will, application and order admitting same to probate, and closing order (if applicable) recorded in the Deed Records of the county where the decedent owned real property

Letters of Administration  
Death Certificate  
Affidavit of Heirship or appropriate recorded conveyance  
\*Operator reserves the right to request additional probate materials, in its sole discretion

#### Name Changes

1. An individual's name changes due to marriage, divorce, etc.
2. Company or corporation changes its name only
3. Company or corporation's name changes due to merger

Copy of the marriage certificate or divorce decree reinstating maiden name or other document effecting name change

Certificate of Name Change (verification of Tax I.D. to be used should be included)

Certificate of Merger (if Tax I.D. is changing, then appropriate recorded conveyances should be included)

#### Trusts

1. Trust is created
2. Trust is terminated

Copy of Trust Agreement and appropriate recorded conveyance transferring interest to the trust (verification of Tax I.D. to be used should be included)

Copy of Dissolution of Trust and appropriate recorded conveyance (verification of Tax I.D. to be used should be included). A Dissolution of Trust can come in different forms and depends upon the terms of the trust (death, age threshold, timeframe, i.e., when one finishes college, gets married, etc.)

#### Guardianship

1. Owner declared incompetent
2. Owner, previously a "minor", reaches legal age

Court issued Letter of Guardianship naming guardian

Copy of birth certificate

#### Change of Ownership Due to Divorce

Appropriate recorded conveyance

#### Bankruptcy

1. Chapter 11 (Debtor in Possession)
2. Chapter 7

Plan of reorganization  
Order Confirming the Plan of Reorganization  
Appropriate recorded conveyance

#### Owner Having a Life Estate Dies

Copy of the 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 With Rights of Survivorship (JTWROS), and Tenants in Common

Copy of death certificate (furnish Tax I.D. if changing)

#### Foreclosures, Sheriff's Deeds, Tax Sales, and Judgments

Check with Legal Department for appropriate documents

#### Payout and Reversions

Check with Legal Department for appropriate documents