



Trust/Partners/LLC/Corp Transfer of Interest Document Checklist

Transferring an Interest into a Trust (Not upon death)

- Copy of the recorded conveyance into the Trust
- W-9 for the Trust
- Owner Contact Form
- *Copy of the Trust Agreement

Change of Trustee Due to Death, Incapacity, or Resignation

- Copy of Death Certification for Trustee or Resignation of Trustee, recorded in the county where the property is located
- Copy of Acceptance by Successor Trustee or Court Order appointing a Successor Trustee if not identified in the Trust or an Amendment to the trust

Revocation or Termination of a Trust

- Copy of the Trust Agreement, any amendments to the Trust Agreement, and Revocation, Dissolution, or Termination of Trust Documentation
- Copy of the recorded conveyance from the Trust to Grantee / Beneficiaries
- W-9 for each Grantee / Beneficiary named in the conveyance
- Owner Contact Form

Transferring an Interest into a Partnership, Corporation, or LLC

- Copy of the recorded conveyance into the Partnership, Corporation, or LLC
- W-9 for the Partnership, Corporation, or LLC
- Owner Contact Form
- *Documentation as to who is the General Partner for the Partnership

Transfer Out of / Dissolution of a Partnership, Corporation, or LLC

- Copy of Articles of Incorporation / Organization / Partnership Agreement or other document authorizing the entity to convey the property



Trust/Partners/LLC/Corp Transfer of Interest Document Checklist

- Copy of filing with the Secretary of State or Official Agency responsible for the Partnership, Corporate, or LLC Dissolution (if applicable)
- Copy of recorded conveyance
- W-9 for the new owner
- Owner Contact Form

* Copies of the Trust Agreement and General Partner documentation should be requested, but are not required to transfer into a Trust, Corporation, or LLC.