



# Standard Transfer of Interest Document Checklist

## Transfer of Interest – Individual to Individual

- Recorded deed
- W-9 for each individual listed on the deed
- Owner Contact Form

## Transfer of Interest – Due to Divorce

- \*Copy of Divorce Decree
- Copy of Settlement Agreement/Judgment/Recorded Conveyance
- W-9 for individual(s) listed in Settlement/Judgment/Conveyance
- Owner Contact Form

## Creating a Life Estate

- Recorded deed to the new party
- W-9 for each individual listed on the deed (Life Tenant and Remaindermen)
- Owner Contact Form

## Transferring from a Life Estate

- Recorded deed/conveyance that transfers the retained life estate interest (which terminates on the death of the original grantor/life estate holder)
- W-9 for Grantee
- Owner Contact Form

## Terminating a Life Estate

- Death Certificate of the life estate holder(s)
- Affidavit of Surviving Remainderman

**NOTE:** W-9 and Owner Contact Form are not required for existing owners. Additionally, a Divorce Decree is not necessary if recorded conveyance documents are received.