



WAVELAND CAPITAL PARTNERS
19800 MacArthur Blvd., Suite 650
Irvine, CA 92612
Tel: 949.706.5000 Fax: 949.759.5009

Client Account Ownership Change

Documents required to change client's ownership information.

Note: There is a fee of \$25.00 for all changes. Make your check payable to Waveland Capital Partners.

YOUR REQUEST	WHAT WE NEED FROM YOU
NAME CHANGES	
Due to marriage	• Copy of Marriage Certificate • Signed Letter of Instruction (LOI) • Other document affecting name change, if applicable
Due to divorce	• Divorce Decree • Copy of document conveying title from the clerk in the county in which the interest is located • Signed Letter of Instruction (LOI) • Other document affecting name change
To the name of a company or corporation	• Certificate of Name Change valid in the state where the interest is located, including Tax ID number • Signed Letter of Instruction (LOI) • Corporate documents
Due to a merger of a company or corporation	• Certificate of Merger valid in the state where the interest is located including Tax ID number • Signed Letter of Instruction (LOI) • Corporate documents
For appointment of Attorney-In-Fact	• Copy of the Power of Attorney
TRUSTS/PARTNERSHIPS	
Trust or Partnership is created	• Trust or Partnership Agreement • Recorded document conveying the interest in a property to a Trust or Partnership (if applicable) • Signed Letter of Instruction (LOI)
Trust or Partnership is terminated	• Dissolution of Trust or Partnership • Recorded conveyances to beneficiary (if applicable) • Signed Letter of Instruction (LOI)



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Changes in Trustee	- Instrument whereby the successor trustee was appointed. - Signed Letter of Instruction (LOI)
DEATH OF A JOINT TENANT	- Copies of Death Certificate of Joint Tenant - Signed Letter of Instruction (LOI)
ESTATE PROCEEDINGS	
Owner died with a Will (testate) and probate proceedings were conducted in the state where the property is located	- Order Admitting Will to Probate - Letters Testamentary - Last Will and Testament - Final Decree of Distribution or Judgment of Possession - Copy of Death Certificate - Signed Letter of Instruction (LOI)
Owner died with a Will (testate) and probate proceedings were conducted in a state <u>other</u> than the state where the property is located	- Order Admitting Will To Probate - Letters Testamentary - Last Will and Testament - Final Decree of Distribution or Judgment of Possession - Documentation of ancillary probate proceedings opened in all affected states or Affidavit of Heirship - Copy of Death Certificate - Signed Letter of Instruction (LOI)
Owner died without a Will (intestate) (state laws of descent and distribution will apply)	- Copy of Death Certificate - Copy of Life Tenant's Death Certificate (if applicable) - Names and addresses of remaindermen (if applicable) - Letters of Administration - Affidavit of Heirship - Signed Letter of Instruction (LOI)
ALL OTHER INQUIRIES	Contact Waveland Capital Partners or info@wavelandcp.com .