



Ownership Change Guide

Listed below are common situations which involve a change in ownership or ownership status, along with the documents needed to effect the change. Please note, it is Spur's policy to pay based on record title where the real property resides.

General Information:

All changes of ownership **must** be filed of record in the County where the property is located. You can access the National Association of Counties website to locate the contact information for county clerk's offices here: <http://www.naco.org/>.

There is a fee for recording the document(s) and this fee must be included with the document when it is sent for recording. Obtain the specific amount due for recording by contacting the county clerk's office. Before mailing the document, place your name and address on the upper right-hand corner, requesting to have the recorded document returned to you. When you receive the returned document, make a **COPY** of the recorded document and forward it to: DivisionOrders@spurepllc.com, by fax to 832-930-8503, or via USPS to:

Spur Energy Partners LLC
Attn: Division Orders
PO Box 79840
Houston, TX 77279

All Payees are required to provide a social security or tax identification number. Failure to comply will result in a tax withholding rate of 24%, per IRS Code Sec. 3406 (a)(1), as amended by the Tax Cuts and Jobs Act of 2018, and will not be refundable by Spur. More information about backup withholding can be found here <https://www.irs.gov/pub/irs-pdf/p1281.pdf>.

Name Changes

An individual's name changes due to marriage or divorce:

- Copy of Marriage Certificate or Divorce Decree reinstating maiden name or another prior name
- Revised W-9 form

Legal name change:

- Court order evidencing name change
- Revised W-9 form

Company or corporation changes its name:

- Certificate of Name Change and Tax ID Number
- Revised W-9 form

Company or corporation's name change due to a merger:

- Certificate of Merger including Tax ID Number

Appointment of Attorney-In-Fact:

- Copy of Power of Attorney filed of record in county/parish in which the property is located

Appointment of Agent or Agency:

- Copy of agency agreement
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Trusts

Trust is created:

- Trust Agreement
- Conveyance document transferring interest(s) to the Trust

Trust is terminated:

- Dissolution of Trust
- Conveyance document transferring interest(s) to applicable beneficiary(s)

Changes in Trustee:

- Trust Agreement
 - Copy of the instrument whereby the successor trustee was appointed (i.e. death certificate, resignation of trustee, appointment of trustee)
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Bankruptcy

Chapter 11:

- Plan of reorganization
- Order confirming the plan of reorganization

Chapter 7:

- Recorded conveyance document (if applicable)
- Order Naming Trustee of Bankruptcy Estate

Death of Owner

If the decedent's Will is probated in the state where the property is located:

- Death Certificate
- Last Will & Testament
- Order Admitting Will to Probate/Final Probate Order
- Letters Testamentary/Letters of Administration and/or Final Decree of Distribution
- Conveyance Deeds to heirs/beneficiaries or Trust, if applicable
- W-9 for each heir/beneficiary or Trust with current addresses

If the decedent's Will is not probated in the state where the property is located:

- Death Certificate
- Foreign Letters Testamentary/Administration or Proof of Authority
- Authenticated copies (three-way certificate) of the decedent's Will and the Order admitting it to probate in a foreign jurisdiction (Texas)
- Decedent's Will and the Order admitting it to ancillary probate (Arkansas, Colorado, New Mexico, Oklahoma, Wyoming)
- Conveyance/Distribution Deeds to heirs/beneficiaries or Trust, if applicable
- W-9 for each heir/beneficiary or Trust with current addresses

If the decedent did not leave a Will, or the Will is not being probated in the state where the property is located, it is Spur's policy to accept an Affidavit of Heirship only if the decedent's revenue is \$500 or less per month. If this scenario is applicable to the referenced decedent owner's interest, please furnish:

- Death Certificate
- Copy of the decedent's Will (if one exists)
- Affidavit of Heirship form completed by a disinterested third party (it CANNOT be filled out by any party who stands to inherit from the Estate). The form must be witnessed, notarized and recorded in all counties where interests are owned by the decedent. Please note that ownership transfer by an Affidavit of Heirship is according to the Laws of Descent and Distribution where the property is located, which may or may not agree with the decedent's wishes.
- W-9 for each heir with current addresses

If the decedent did not leave a will and revenue from decedent's interest in these properties is more than \$500 a month, please open administration proceedings to probate the estate without a will.

If the owner of a life estate dies:

- Death Certificate of life tenant
- W-9 for each remaindermen with current addresses

If the owner of a joint tenancy dies:

- Death Certificate of joint tenant
- W-9 for surviving tenant (if applicable)

Miscellaneous Information

Transfer an interest:

- Conveyance document (deed, assignment, bill of sale, etc.) that transferred the interest, notarized and recorded in the county where the property is located
- W-9 for new owner

Ownership change due to divorce:

- Complete Divorce Decree including Settlement Agreement
- If appropriate, recorded conveyances

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