

## CHANGE OF OWNERSHIP GUIDE

A change of ownership cannot be processed without receiving the request in writing, accompanied by a recorded conveyance document from the record title owner. It is the owner's responsibility to notify us as to any ownership or status changes to reflect current record title.

The conveyance must clearly describe the property to be transferred, along with the conveyance recording information for the county in which the property is located. Please include the following information:

- Name of current owner and owner number, if available
- A copy of the recorded conveyance, assignment, or deed
- Your name, address and social security number or tax ID number
- A phone number including area code, where the contact person can be reached during business hours
- Email address, if available

Below contains guidance regarding specific documentation required for different types of ownership changes. All new payees are required to submit a completed IRS Form W-9 with evidence of a valid SSN or TIN.

**Original documents will not be returned;** send a COPY (or copies) of the documents requested. All ownership change requests, and associated documentation should be directed to the following:

Tailwater E&P LLC c/o EAG Services

P.O. Box 131328

Houston, TX 77219

**OR EMAILED TO:**

[Tailwater-OwnerRelations@eag1source.com](mailto:Tailwater-OwnerRelations@eag1source.com)

## 1. Name Changes

Personal:

- Marriage: Copy of Marriage Certificate
- Divorce: Copy of Divorce Decree reinstating maiden name or prior name
- Legal Name Change: Court documentation supporting name change

Company:

- Certificate of Name Change

Merger:

- Certificate of Merger and tax ID number

## 2. Trust or Partnership Changes

Creation of a Trust or Partnership:

- Trust or Partnership Agreement and subsequent Amendments
- Recorded conveyance(s) to the Trust or Partnership Termination of a Trust or Partnership:
- Trust or Partnership Agreement and subsequent Amendments
- Dissolution of Trust or Partnership
- Recorded conveyance(s) to beneficiaries or partners Change of Trustee:
- Due to Death
  - Certificate of Death of current Trustee and document appointing Successor Trustee(s)
  - Trust Agreement and subsequent amendments
- Due to Resignation
  - Recorded document stating resignation of current Trustee and appointment of Successor Trustee(s)
  - Trust Agreement and subsequent Amendments

### 3. Owner Passes Away

Owner passes away with a Will (Testate) and Estate has been probated in state where property is located:

- Certificate of Death for Owner
- Copy of Last Will and Testament
- Order Admitting Will to Probate
- Letters of Testamentary
- Evidence of debt and taxes being paid
- Final Decree and/or Certificate of Transfer

Owner passes away with a Will (Testate) and Estate will not be probated:

- Certificate of Death for Owner
- Copy of Last Will and Testament
- An Affidavit of Heirship properly completed and notarized. It should be executed by one disinterested party and recorded in the county where this property is located

Owner passes away without a Will (Intestate) and the Estate has been administrated (Laws of Descent and Distribution will apply as relevant):

- Certificate of Death for Owner
- Certified copy of administration of proceedings
- Evidence of debt and taxes being paid
- Final Decree and/or Certificate of Transfer

Owner passes away without a Will (Intestate) and no administration will occur:

- Certificate of Death for Owner
- An Affidavit of Heirship properly completed and notarized. It should be executed by one disinterested party and recorded in the county where this property is located

Owner having a life estate passes away:

- Certificate of Death for Owner
- Copy of Deed creating Life Estate
- Name(s), Address(es) and Tax ID number(s) for Remainderman/Remaindermen

Joint Tenancy ownership and one tenant passes away:

- Certificate of Death for Owner
- Copy of Deed creating Joint Tenancy
- Recorded Affidavit of Surviving Spouse or Joint Survivor

**4. Sale of Interest**

- Conveyance filed of record in the county in which the property is located

**5. Appointments of Attorney-in-Fact or Agent**

- Copy of Power of Attorney
- Copy of Agency Agreement

\*Disclaimer: This document shall serve as a general guide for commonly requested documentation. In some situations, Tailwater E&P may require additional documentation not listed above. You are strongly encouraged to contact an Oil and Gas attorney to assist you in this process. Tailwater E&P cannot provide specific advice or sample conveyance instruments.