

MORTIMER PRODUCTION COMPANY
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ownerrelations@mortimerproduction.com

Changes in ownership can occur for a number of reasons and the requirements for each vary.

Please see below for documents required to start your ownership change:

1. Death of Owner

We are so sorry for your loss. Because each owner's situation is unique, the requirements for transferring ownership upon the death vary. To get started, please provide us with a copy of the death certificate and, if the owner died with one, a copy of their will. It is also helpful to have the names, addresses, phone numbers, and email addresses of beneficiaries.

2. Transfer of Interest (owner sells or conveys full or partial interest)

Copy of the recorded deed/assignment, new owner's address, phone, and email information, and a completed IRS Form W-9 for the new owner.

3. Transfer to Trust/Partnership/LLC

Recorded conveyance into Trust/Partnership, entity's address, phone, and email information, and a completed IRS Form W-9 for the entity

4. Dissolution or Transfer from Trust/Partnership

Copy of the recorded deed/assignment, new owner's address, phone, and email information, a completed IRS Form W-9, and a copy of the Trust Agreement if applicable.

5. Change of Trustee

Legal document evidencing appointment of successor trustee along with address information, and a completed IRS Form W-9

Please mail or email these documents along with a cover letter explaining the ownership change to the contact information at the top of the page.
