



## OWNERSHIP TRANSFERS

In order to process requested transfers of ownership, CalNRG will need copies of the application documentation listed below.

Circumstance	Required Documentation
<b>Death of Owner:</b> Owner Died with a Will (Testate) and Probate Proceedings are Conducted in State where the Property is Located	<ul style="list-style-type: none"> <li>• Copy of Death Certificate</li> <li>• Copy of Probated Will</li> <li>• Order admitting Will to Probate</li> <li>• Letters Testamentary</li> <li>• All final Probate Documents issued by the courts and recorded in county in which the property is located</li> <li>• Contact information for all heirs, including executed W-9 forms</li> </ul>
<b>Death of Owner:</b> Owner Died with a Will (Testate) and Probate Proceedings are <b>not</b> Conducted in State where the Property is Located	<ul style="list-style-type: none"> <li>• Copy of Death Certificate</li> <li>• Copy of Probated Will</li> <li>• Copy of all Ancillary Probate Proceedings recorded in county in which the property is located</li> <li>• Contact information for all heirs, including executed W-9 forms</li> </ul>
<b>Death of Owner:</b> Owner Died without a Will (Intestate) and the Estate is under Administration	<ul style="list-style-type: none"> <li>• Copy of Death Certificate</li> <li>• Copies of all Administration Proceedings recorded in county in which the property is located</li> <li>• Contact information for all heirs, including executed W-9 forms</li> </ul>
<b>Death of Owner:</b> Owner Died without a Will (Intestate) and no Administration Proceedings will be Conducted, or Owner Died with a Will which will not be Probated	<ul style="list-style-type: none"> <li>• Copy of Death Certificate</li> <li>• Copy of a Court Order Determining Succession to Property under CA Probate Code Sec. 13150 or an Affidavit of Real Property of Small Value under CA Probate Code Sec. 13200</li> <li>• Contact information for all heirs, including executed W-9 forms</li> </ul>
<b>Death of Life Estate Owner</b>	<ul style="list-style-type: none"> <li>• Copy of Death Certificate</li> <li>• Copy of Deed that created Life Estate</li> <li>• Remaindermen addresses and executed W-9 forms</li> </ul>
<b>Death of Joint Tenant</b>	<ul style="list-style-type: none"> <li>• Copy of Death Certificate</li> <li>• Copy of Affidavit of Death of Joint Tenant recorded in the county in which the property is located</li> </ul>
<b>Death of Trustee/Co-Trustee</b>	<ul style="list-style-type: none"> <li>• Copy of Death Certificate</li> <li>• Copy of Affidavit of Death of Trustee/Co-Trustee recorded in the county in which the property is located</li> </ul>
<b>Name Change: Marriage or Divorce</b>	<ul style="list-style-type: none"> <li>• Copy of Marriage Certificate or Divorce Decree</li> </ul>



<b><i>Name Change/Merger: Corporation</i></b>	<ul style="list-style-type: none"> <li>• Certificate of Name Change and Tax ID No.</li> <li>• Certificate of Merger and Tax ID No.</li> </ul>
<b><i>Trust or Partnership: Created/Dissolved</i></b>	<ul style="list-style-type: none"> <li>• Copy of Trust or Partnership Agreement</li> <li>• Documentation evidencing dissolution of the Trust or Partnership</li> <li>• Any recorded deeds or conveyances</li> </ul>
<b><i>Trust or Partnership: Change of Trustee</i></b>	<ul style="list-style-type: none"> <li>• If Trustee is deceased, recorded documentation evidencing appointment of Successor Trustee</li> <li>• If Trustee is not deceased, a copy of the Trust Agreement and a copy of the documentation required by the Trust Agreement to change the Trustee</li> </ul>
<b><i>Transfer from an Individual to Another Individual</i></b>	<ul style="list-style-type: none"> <li>• A copy of an executed deed or conveyance recorded in the county in which the property is located</li> </ul>
<b><i>Transfer from an Individual to a Trust or from a Trust to an Individual</i></b>	<ul style="list-style-type: none"> <li>• A copy of an executed deed or conveyance recorded in the county in which the property is located</li> <li>• A copy of the Trust Agreement</li> </ul>
<b><i>Appointment of Attorney-In-Fact</i></b>	<ul style="list-style-type: none"> <li>• Copy of Power of Attorney</li> </ul>

All documentation can be scanned and emailed to [owner@calnrg.com](mailto:owner@calnrg.com) or sent via mail to:

**CalNRG Operating, LLC**  
**Attn: Owner Relations**  
**1746-F South Victoria Ave., #245**  
**Ventura, CA 93003**

For any questions, please feel free to call us at (805) 393-2727 or email us at [owner@calnrg.com](mailto:owner@calnrg.com).

Additionally, please note the following:

- When we receive notice of a change of ownership, the interest will temporarily be placed in suspense pending receipt of the required documentation and processing of the transfer.
- In order to avoid Federal tax backup withholding, an executed W-9 form can be emailed or mailed as indicated above.
- In lieu of a copy of the Trust Agreement, we can accept a Certification of Trust under CA Probate Code Sec. 18100.5.