

## **Documentation Requirements for Ownership Changes and Other Events**

Please see below for documentation necessary to process changes in Ownership. If you have any questions, please contact our owner relations hotline at 832.939.8958 or email: <a href="mailto:owner-relations@prolinenergy.com">owner-relations@prolinenergy.com</a>

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	Situation	A copy of the following documents is required
Address Changes	Address Changes	-Send your completed change of address request form by any of the methods below -Fax (must include signature) -mail
Name Change	Due to Marriage, Divorce, etc.	-Change of Name form -Marriage certificate or certified -Divorce decree reinstalling maiden name -Other official documentation affecting name change, i.e. Certified Court Order
	Company or Corporation	-Certified Name Changes including Tax Identification Number
	Merger of Company or Corporation	-Certificate of Merger including -Tax Identification Number
	Appointment of AIF (Attorney in Fact	-Copy of AIF/Power of Attorney Document
Sale of Interest	Sales of an Interest	-Assignment/Conveyance filed of record in the county/parish where the property is located
Ownership Change Due to Divorce	Owners Divorce	-Recorded copy of final Divorce Decree including Settlement Agreement, AND, If appropriate, -Recorded Assignment,

/Conveyance



Trusts/Partnership

Trust or Partnership is created

-Trust or Partnership Agreement, AND, if

appropriate,

-Recorded document conveying thee interest in property to a trustee of a trust or partnership (conveyance MUST name

Trustee)

Trust or Partnership is

terminated

Dissolution of Trust or Partnership AND, if

Appropriate,

-recorded conveyance to

beneficiary

Changes in Trustee

-Copy of Trust/Partnership Agreement, if not already in our files OR relevant pages of agreement (That name Trust, Trustee, and/or Successor

Trustees)

-Copy of resignation of Trustee and Acceptance by Successor

Trustee

**Estate Proceedings** 

Owner died with a will (testate) and Probate proceedings are being conducted in the state where the property is located -Death Certificate

-Order Admitting Will to Probate in County/Parish of

property

-Letters Testamentary -Last Will and Testament

-Evidence debts and taxes have

been paid

-Final Decree of Distribution or Judgement of Possession in County/Parish of Property



**Estate Proceedings Continued** 

Owner died with a will (testate) and Probate proceedings are being conducted in the state OTHER than where the property is located Owner died without a will (intestate) NOTE: Laws of Descent & Distribution will Apply

-Ancillary Probate Proceedings opened in the state where property is located OR

-If monetary threshold is not exceeded.

-Death Certificate

-Letters of Administration (If applicable)

-Affidavit of Heirship recorded in the county where the property is located and signed by disinterested third party -Executed W-9 for all heirs

If you have any questions, please contact our owner relations hotline at 832-939-8958 or email: owner-relations@prolineenergy.com.

Proline's Fax Number: 832-886-4257

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