

## Changes to your AMI account

**\*\*Please submit a completely filled out W9 for any and all changes\*\***

Name Change		
Name Change Type		Submit
Person name change due to marriage, divorce, etc.	→	Marriage certificate, divorce decree or other document affecting name change
Appointment of attorney-in-fact	→	Copy of power of attorney
Company or corporation name change	→	Certificate of name change or merger along with tax ID

Ownership Change		
Ownership Change Type		Submit
Sale of interest/property	→	Conveyance (deed, assignment, etc.) filed of record in the county of the interest/county
Trust or partnership is created	→	Trust or partnership agreement and recorded document conveying the interest in a property to a trust or partnership
Trust or partnership is terminated	→	Dissolution of trust or partnership and, if appropriate, recorded conveyances to beneficiary
Changes in trustee	→	Instrument whereby the successor trustee was appointed
Termination of joint tenancy or life estate	→	Death certificate of joint tenant

Estate Affairs		
Estate Affair Type		Submit
Owner died with a Will (testate) and probate proceedings are to be conducted in the state where the property is located	→	Death certificate, Order admitting will to Probate, Letters testamentary, Last will and testament, Final decree of distribution or judgment of possession
Owner died with a Will (testate) and probate proceedings are to be conducted in a state other than the state where the property is located	→	Death certificate proceedings, Last will and testament, Letters testamentary, Order admitting will to Probate, Final decree of distribution or judgment of possession, Documentation of ancillary probate proceedings opened in all affected states or affidavit of heirship
Owner died without a Will (intestate) Laws of descent and distribution will apply as relevant	→	Death certificate, Letters of administration, Affidavit of heirship, Life tenant's death certificate, Name and addresses of remaindermen

Bankruptcies		
Bankruptcies Type		Submit
Chapter 11	→	Plan of reorganization
Chapter 7	→	Recorded conveyance (as appropriate) and an order naming trustee of bankruptcy estate

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