

## **INSTRUCTIONS FOR CHANGE OF OWNERSHIP INVOLVING TRUSTS**

1) If the intent is to **transfer ownership from an individual account into a Trust (or vice versa)**, XTO will require the following documentation\*:

- Copy of the deed that conveys the interest from the name of the individual account into the name of the trust (Or vice versa)
- Copy of the Trust or Memorandum / Certificate of Trust
- Tax ID for the new owner (W9)

\* If the current owner passed away, please provide us with a copy of the Death Certificate, in addition to the above documentation.

2) If the intent is to **transfer ownership from a Trust to the beneficiaries**, XTO will require the following documentation:

- Copy of the deed that conveys the interest from the name of the Trust into the name of the beneficiaries
- Copy of the Trust or Memorandum / Certificate of Trust
- Tax ID for the new owner (W9)

\* If the grantor passed away, please provide us with a copy of the Death Certificate, in addition to the above documentation.

3) If the **Trustee needs to be updated** but the interests will remain under the name of the Trust, please provide XTO with the following documentation:

- Copy of the Trust or Memorandum / Certificate of Trust
- Death Certificate for the Trustee

When available, please forward all the necessary documents to XTO Energy in the following way:

**Email:** [divorder@xtoenergy.com](mailto:divorder@xtoenergy.com) (scan and attach as a PDF)