CHASE

UPDATING MORTGAGE INFORMATION FOLLOWING A DEATH:

Add a court-appointed fiduciary to a deceased customer's estate

We're very sorry for your loss and understand this may be a difficult time for you. You may have questions about handling the existing mortgage. Maybe you aren't sure where to start or what questions to ask. We're here to help you understand your options, depending on your situation.

For situations where a court has appointed an executor, administrator or personal representative for the estate of the deceased customer, that person may be authorized to receive information and make decisions about the mortgage loan.

Please use this kit to add the court-appointed fiduciary to the account. That will allow us to share account information with that person, including statements and correspondence. However, we cannot issue Form 1098 (Mortgage Interest Statement) if the account is managed by an estate. Contact your tax advisor for more information.

If you have questions, call us at 1-866-299-6752; we accept operator relay calls.

THIS REQUEST DOES NOT CHANGE WHO IS FINANCIALLY RESPONSIBLE FOR THE LOAN.

Si tiene alguna pregunta, por favor llame al 1-866-299-6752.

Add a court-appointed fiduciary to a deceased customer's estate

To submit your request, please send us:

- A completed **Cover Sheet**

Also send a copy of:

- The **certified death certificate** for the deceased customer if you haven't already provided it
- The deceased customer's **notarized will**, or a letter of administration or other court document that appoints a fiduciary for the estate; the letter must have a seal stamp showing the court, file number or recorded book and page number.

HOW TO SEND

Fax:

1-614-422-7575

Mail:

Chase
Mail Code LA4-6555
700 Kansas Lane
Monroe, LA 71203

Secure Message:

Sign in to your chase.com account to upload your documents and send us a message. If you're not an account holder, you'll need to submit documents by fax or mail.

FREQUENTLY ASKED QUESTIONS

Does owning a property and being liable for mortgage payments mean the same thing?

No. You can be the property owner without being liable for making payments. However, the property is still subject to the terms of the mortgage, and payments should be made to keep the loan in good standing.

I would like to have financial responsibility for the loan — what do I need to do?

Please call us at 1-866-299-6752. We will discuss your options with you.

Can I receive loan information if I'm not a family member?

No, unless you are appointed as a fiduciary or successor trustee.

Why do you need proof of relationship?

Protecting our customer's information is important to us. We need to verify your identity to protect against inappropriate use of the account.

What can I do with the property?

If you're taking ownership of the property, you should make payments to keep the account in good standing. If you decide to pay off the account now or later, please call us and we will help you.

How do I know if the loan is up to date?

We can provide the status of the loan and other secure information after we receive your documents and update the account.

What will happen if no updates are made to the account or no action is taken?

The loan will go into default status, and the property will be at risk. If you expect difficulties making payments, call us to see what assistance options we can offer.

Can I provide photocopies of the documents you are requesting?

Yes, we will accept copies. If you're having trouble finding the death certificate, we may be able to help you locate it. Please call us.

How do I get a copy of the recorded deed for the property?

Contact the recorder's office for the county where the property is located.

Do you charge a fee for making changes following the death of a customer?

No.

What if I still have questions about a mortgage or home equity line of credit?

Please call us at 1-866-299-6752; we accept operator relay calls. Or you can send us a message through the message center on chase.com.

For more information about your home lending and other Chase accounts, visit chase.com/EstateServices.

CHASE

COVER SHEET

UPDATING MORTGAGE INFORMATION FOLLOWING A DEATH

Add a court-appointed fiduciary to a deceased customer's estate

PLEASE COMPLETE AND INCLUDE WITH YOUR DOCUMENTS

Date:

Requestor name:

Relationship to deceased customer(s):

Property address:

Email address:[1]

Loan number:

Phone number:

HOW TO SEND

Fax:

1-614-422-7575

Mail:

Chase
Mail Code LA4-6555
700 Kansas Lane
Monroe, LA 71203

Secure Message:

Sign in to your chase.com account to upload your documents and send us a message. If you're not an account holder, you'll need to submit documents by fax or mail.

[1] When you give us your email address, we have your permission to contact you at that address about all your Chase or J.P. Morgan accounts. Your consent allows us to use email for informational and account service correspondence, but not for telemarketing or sales emails. It may include contact from companies working on our behalf to service your accounts. You may contact us anytime to change these preferences.

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