



UPDATING MORTGAGE INFORMATION FOLLOWING A NAME CHANGE

This guide will help you correct or change a name on your mortgage loan due to:

- Marriage
- Divorce
- Legal name change
- Naturalization

Forms included:

- Cover Sheet
- Substitute Form W-9 (Request for Taxpayer Identification Number and Certification)

WE'RE HERE TO HELP

This guide will walk you through the process, provide and explain the necessary forms and serve as a road map for you to complete your request.

Remember, we're available to answer your questions—call us at **1-866-299-6752**; we accept operator relay calls.

PLEASE NOTE:

This request doesn't change who is financially responsible for the loan. To do this, you'll need to apply for a loan assumption. Please call us at **1-866-299-6752** to confirm this option is available for this loan type and request an Assumption Application Package.

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



HOW TO CORRECT OR CHANGE A NAME ON YOUR MORTGAGE LOAN

This request is to correct or change a name on a loan due to marriage, divorce, legal name change or naturalization.

What you need to do:

Please complete and send us the following documents (which are included in this guide), using your new name:

- Cover Sheet
- Substitute Form W-9

And either:

- A copy of your driver's license and a copy of your Social Security card with your new legal name, or
- A copy of whichever of the following documents applies to your request:
 - Marriage certificate
 - Divorce decree with name restoration
 - Court order for your new legal name change
 - Certificate of naturalization
 - Your most recent tax return with your new legal name

* If you have more than one mortgage or Home Equity account, we will complete your name change on all of your accounts.

You can send your documents using one of the following methods:

Online:

You can securely submit your documents to us at chase.com/DocumentUpload

Fax:

1-614-422-7575

Mail:

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

FREQUENTLY ASKED QUESTIONS

I was recently married and want to allow my new spouse to receive information about the loan. What do I need to do?

To allow your spouse to have access to loan information, please send a written request to:

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

Making this request doesn't remove the original borrower(s) from the loan and won't affect the financial obligation of the borrower(s) on the loan.

To make your spouse financially responsible for the loan, you'll need to apply for a loan assumption. Please call us at 1-866-299-6752 to request an Assumption Application Package.

I was recently divorced and awarded our home and property. I want to have my ex-spouse removed from the loan. What do I need to do?

To remove your ex-spouse from financial responsibility for the loan, you'll need to apply for a loan assumption. Please call us at 1-866-299-6752 to request an Assumption Application Package.

What's the difference between a name change and an assumption?

A name change doesn't change anyone's financial responsibility for the loan—it only corrects or changes the name on the loan in the case of marriage, divorce, a legal name change or naturalization. An assumption allows a new customer to become financially responsible for the loan or releases a current customer from financial responsibility. To request an Assumption Application Package, call us at 1-866-299-6752.

Can I provide a photocopy of the document you're requesting?

Yes, you can just make a copy of the marriage certificate, divorce decree, court order, certificate of naturalization or most recent tax return and send it to us.

Why do I have to fill out a Form W-9?

This form certifies your name and Social Security number for tax-reporting purposes.

Do you charge a fee for a name change?

No, we don't charge a fee for changing the name on a loan.

What if I still have questions?

You can call us at 1-866-299-6752; we accept operator relay calls.



COVER SHEET

Updating Mortgage Information Following a Name Change

Please complete and include this Cover Sheet with your documents.

Date (MM/DD/YYYY): _____

Loan number(s): _____

Requestor name: _____

Address: _____

Phone number: _____

* If you have more than one mortgage or Home Equity account, we will complete your name change on all of your accounts.

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SUBSTITUTE FORM W-9: Request for Taxpayer Identification Number and Certification

In order for your account information to be updated properly, you must complete, sign and date this Form W-9 in addition to the other documentation requested in this guide. To avoid delays, please make sure the information provided is clearly printed. **Further instructions for this form can be found at [irs.gov](https://www.irs.gov).**

Loan number: _____

Name: _____

Address:
(Street, city, state and ZIP code): _____

Exemptions:
Exempt payee code (if any): _____

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any): _____

Part I – Taxpayer Identification Number (TIN)

Check **only one** choice and provide your complete name and Taxpayer Identification Number.

U.S. resident—Individual/Sole proprietor/Single member Limited Liability Company (LLC)
Social Security number _____ - _____ - _____ or Employer Identification Number _____ - _____

U.S. Partnership, LLC or Trust Name (as shown on your tax return)

Employer Identification Number: _____ - _____

U.S. Corporation Name (as shown on your tax return) _____
Employer Identification Number: _____ - _____

Part II – Certification

Please check item 2 below if you have been notified by the Internal Revenue Service (IRS) that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

Under penalty of perjury, I certify that:

1. The number shown on this form is my correct Taxpayer Identification Number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because:
 - a. I am exempt from backup withholding, or
 - b. I have not been notified by the IRS that I am subject to backup withholding as a result of failure to report all interest or dividends, or
 - c. The IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. resident (including U.S. resident alien), and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

Signature: _____ Date: _____

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Mail:

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