



UPDATING PROPERTY OWNERSHIP INFORMATION

This guide will help you request approval to transfer the property into a trust.

Form included:

- Cover Sheet

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 REQUEST APPROVAL TO TRANSFER THE PROPERTY INTO A TRUST

This guide will help you request approval to transfer the property into a customer's **qualified living trust**. It doesn't remove the original borrower(s) from the loan and won't affect the financial obligation of the borrower(s) on the loan.

What you need to do:

Please send us:

- A completed **Cover Sheet** (which is included in this guide)
- A **trust agreement**—includes the names of the trustees/beneficiaries, describes the trust property and provides the terms of the property transfer
- An executed deed that shows the property being transferred into a trust.

Once we review these documents, we'll send you written permission to have the new deed recorded to complete the transfer of the property. If your request is not approved, we'll send you a letter explaining why. Once the new deed is recorded, please send us a copy so we can update our files.

You can fax or mail these documents to:

Fax:
1-614-422-7575

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

Qualified living trust—a relationship created by a living individual in which the property is placed into a trust for the benefit of the customer.

Deed (for example, warranty or quitclaim deed)—a written document that shows ownership and is used to transfer ownership of a property.

FREQUENTLY ASKED QUESTIONS

How can I get a new executed deed?

We recommend you contact your attorney to get a blank copy of an unrecorded/quitclaim warranty deed. You may also be able to purchase blank copies of a new deed at an office-supply store or download a copy online.

How can I get a trust agreement?

If you are placing your property into a trust, this agreement was likely provided to you by the person coordinating your estate planning (for example, your attorney).

Can I provide a photocopy of the trust agreement or the proposed/unrecorded deed?

Yes, you can just make a copy of the trust agreement or the proposed/unrecorded deed and send it to us.

Do you charge a fee for reviewing and approving a title/deed transfer?

No, we don't charge a fee for making a title/deed transfer.

What if I still have questions?

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



COVER SHEET

Updating Property Ownership Information

Transfer the property into a trust

Please complete and include this Cover Sheet with your documents.

Date (MM/DD/YYYY): _____

Loan number: _____

Requestor name: _____

Address: _____

Phone number: _____

You can fax or mail these documents to:

Fax:

1-614-422-7575

Mail:

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