

**INSTRUCTIONS FOR AGENT:**

- ✓ CONTACT SOS TO DETERMINE IF THERE IS A NAMED SUCCESSOR OWNER FOR POLICY(S).
- ✓ NO ACTION CAN BE TAKEN WITHOUT PROOF OF DEATH AND COURT DOCUMENT, IF APPLICABLE.
- ✓ PLEASE ATTACH PROOF OF DEATH OR POLICY NUMBER WHICH A DEATH CLAIM HAS BEEN PAID IN THE HOME OFFICE. **DO NOT SUBMIT AN OWNERSHIP CHANGE FORM.**

NAME OF DECEASED OWNER		DATE	DISTRICT	ACCOUNT
POLICY NUMBER	INSURED			
POLICY NUMBER	INSURED			
POLICY NUMBER	INSURED			
POLICY NUMBER	INSURED			
POLICY NUMBER	INSURED			

PLEASE ANSWER THE FOLLOWING QUESTIONS:**A. SUCCESSOR OWNER NAMED ON RECORD – IS SUCCESSOR OWNER STILL LIVING? _____ YES _____ NO**

IF YES, PLEASE LIST NAME: _____

ADDRESS: _____

B. IF NO SUCCESSOR OWNER NAMED ON RECORD – ONLY ON ASSIGNMENT CODES 01 AND 03

THE PERSON SEEKING OWNERSHIP WILL NEED TO PROVIDE APPLICABLE DOCUMENTS NECESSARY TO CHANGE OWNERSHIP.

- IF AN ESTATE WAS OPENED AND IS STILL OPEN, PROVIDE A COPY OF LETTERS OF ADMINISTRATION OR IF THE DECEASED HAD A WILL, PROVIDE A COPY OF LETTERS TESTAMENTARY, A COPY OF THE WILL AND A COPY OF THE COURT ORDER ADMITTING THE WILL TO PROBATE.
- IF THE ESTATE IS CLOSED, PLEASE PROVIDE A COPY OF THE FINAL ORDER OF DISTRIBUTION OUTLINING HOW THE ESTATE WAS DISTRIBUTED AND WHO RECEIVED THE ESTATE.
- IF NO ESTATE OPENED, DEPENDING ON THE STATE LAW WHERE THE OWNER DIED, AN ALTERNATE DOCUMENT, SUCH AS A SMALL ESTATE AFFIDAVIT MAY BE AVAILABLE.

(REQUIRED) CONTACT PERSON SEEKING OWNERSHIP:

NAME: _____ PHONE: _____

ADDRESS: _____

C. IF NO SUCCESSOR OWNER NAMED ON RECORD – ONLY ON ASSIGNMENT CODE 02

HAS SOMEONE BEEN APPOINTED GUARDIAN OR CONSERVATOR OF THE INSURED OR HAS SOMEONE INDICATED A DESIRE TO BE OWNER AND WILL PAY FUTURE PREMIUMS? IF SO, PLEASE PROVIDE ALL DOCUMENTATION AND THE FOLLOWING INFORMATION:

NAME: _____

ADDRESS: _____

D. ADDITIONAL COMMENTS:**IF MORE INFORMATION IS NEEDED, WE WILL NOTIFY THE CONTACT PERSON LISTED ON THIS FORM. WHEN A NEW OWNER IS RECOGNIZED, YOU WILL BE NOTIFIED AS WELL AS A LETTER WILL BE MAILED TO THE NEW OWNER WITH FORMS TO UPDATE OUR RECORDS.**