



## Louisiana Ownership Change Guide

Changes in ownership or owner status for land and mineral rights require updated title records. Owners should ensure they have the appropriate documentation, which is outlined in the table below for each type of change. Note, requirements may vary depending on the jurisdiction.

In addressing any ownership change situation, please note the following:

- All payees are required to evidence a valid Social Security or tax identification number by IRS Form W-9, or federal law requires 24% of payment to be withheld in accordance with Section 3406 of the Internal Revenue Service, which will not be refundable by Expand Energy. If you need additional guidance on how to fill out a W-9 form, please refer to the IRS website at [www.irs.gov/w9](http://www.irs.gov/w9). W-9 forms can be found [on our website](#).
- All documents related to a change of ownership must be filed of record in the county/parish where the property is located.
- Laws of agency preclude us from providing forms for conveying real property interests. However, you may contact an attorney, Legal Aid Society or your local Bar Association for assistance in handling these matters.
- Address changes cannot be handled by telephone. If a change of address is needed, complete and submit the Expand Energy Change of Address form, which can be found [on our website](#).
- If an Affidavit of Heirship is needed per the requirements listed below, a form with instructions can be found [on our website](#).
- Retain your check detail for future reference.
- All payments will continue to be made to the current owner until proper documentation is received.
- Please add the Owner Number(s) on all correspondence sent to Expand Energy. This is the number shown on the cover letter sent to you.
- Original documents will not be returned. Please send a COPY (or copies) of the documents requested.

**Submit the appropriate documentation by mail or email to:**

Expand Energy Corporation  
Attn: Owner Relations  
P.O. Box 18496  
Oklahoma City, OK 73154-0496  
Email: [contact@expandenergy.com](mailto:contact@expandenergy.com)



## Documents Required to Process Ownership Changes

In the table below, the type of change or situation is in the left column and the documents to be provided are in the right column. Original documents will not be returned. Send a COPY (or copies) of the documents requested.

Ownership Changes for Louisiana	Documents Needed
Sale of Interest	<ul style="list-style-type: none"><li>• Deed recorded in the county where the property is located</li><li>• W-9 for each new owner</li></ul>
Death of Owner	<ul style="list-style-type: none"><li>• Probate documents (Final Decree/Judgement), if applicable, recorded in the county where the property is located</li><li>• Affidavit of Heirship, applicable if owner has received less than \$2,500 in the last 6 months; must also provide copy of Death Certificate</li><li>• W-9 for each heir</li></ul>
Transfer to Estate	<ul style="list-style-type: none"><li>• Letters of Testamentary (sometimes just called Letters), recorded in the county where the property is located</li></ul>
Name Change	<ul style="list-style-type: none"><li>• Marriage Certificate</li><li>• Divorce Decree (re-instating maiden name)</li><li>• Name Change Court Decree</li></ul>
Trust/Partnership is Created	<ul style="list-style-type: none"><li>• Trust or Partnership Agreement</li><li>• Recorded Deed into the Trust or Partnership</li><li>• W-9 for Trust or Partnership</li></ul>
Trust/Partnership is Terminated	<ul style="list-style-type: none"><li>• Dissolution of Trust or Partnership</li><li>• Recorded Deed to the beneficiary</li><li>• W-9 for Beneficiary</li></ul>
Change in Trustee	<ul style="list-style-type: none"><li>• Document where Successor Trustee was appointed</li></ul>
Transfer of Trust	<ul style="list-style-type: none"><li>• Certificate of Trust which contains information naming the Trustee(s) and their authorization</li><li>• Tax information for the Trust (EIN form from IRS)</li><li>• Deed into the Trust recorded in the county where the property is located</li></ul>
Entity Name Change	<ul style="list-style-type: none"><li>• Certificate of Name Change</li><li>• W-9 providing new Tax ID</li></ul>
Entity Merger	<ul style="list-style-type: none"><li>• Certificate of Merger</li><li>• W-9 providing new Tax ID</li></ul>