



Ohio 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. 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 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](#).
- 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 number can be found on your check detail or division order(s).
- 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



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 Ohio	Documents Needed
Sale of Interest	<ul style="list-style-type: none"> • Deed or conveyance recorded in the county where the property is located • W-9 for each new owner
Death of Owner	<ul style="list-style-type: none"> • Copy of Death Certificate • <u>Testate (Probated Will)</u> <ul style="list-style-type: none"> • Recorded Will and Certificate of Transfer – recorded in the county where property is located • If probated in different state, recorded copy of Will and Probate Documents in the county where property is located • <u>Intestate (No Will/Will not probated)</u> <ul style="list-style-type: none"> • Affidavit of Heirship (found on our website) recorded in the county where property is located • W-9 for each new owner • <u>Property owned with rights of survivorship</u> – Death Certificate and W-9 for surviving owner
Transfer to Estate	<ul style="list-style-type: none"> • Copy of Death Certificate • Letters Testamentary naming the Executor • W-9 for the Estate
Name Change	<ul style="list-style-type: none"> • Marriage Certificate • Divorce Decree (re-instating maiden name) • Name Change Court Decree • Identification showing new name (SS card, state ID, Driver’s license, etc.) • W-9 with new name
Trust/Partnership is Created	<ul style="list-style-type: none"> • Trust or Partnership Agreement • Recorded Deed into the Trust or Partnership • W-9 for Trust
Trust/Partnership is Terminated	<ul style="list-style-type: none"> • Dissolution of Trust or Partnership • Recorded Deed to the beneficiary • W-9 for beneficiary
Change in Trustee	<ul style="list-style-type: none"> • Document where successor trustee was appointed
Transfer of Trust	<ul style="list-style-type: none"> • Certificate of Trust, which contains information naming the trustees and their authorization • Tax information for the Trust (EIN form from IRS) • Deed into the Trust recorded in the county where the property is located
Entity Name Change or Merger	<ul style="list-style-type: none"> • Certificate of Name Change or Merger • W-9 providing new Tax ID