

## Instructions for Change of Ownership Involving Trusts

1. If the intent is **to transfer ownership from an individual account into a trust (or vice versa)**, GME will require the following documentation:
  - Copy of the deed that conveys the interest from the name of the individual account into the name of the trust (Or vice versa)
  - Copy of the Trust of Memorandum/Certificate of Trust
  - Tax ID for the new owner (W-9)
  - **\*\*If the current owner passed away**, please provide us with a copy of the Death Certificate in addition to the above documentation.
  
2. If the intent is to **transfer ownership from a Trust to the beneficiaries**, GME will require the following documentation:
  - Copy of the deed that conveys the interest from the name of the Trust into the name of the beneficiaries.
  - Copy of the Trust or Memorandum/Certificate of Trust
  - Tax ID for the new Owner (W9)
  - **\*\* If the grantor passed away**, please provide us with a copy of the Death Certificate, in addition to the above documentation.
  
3. If the **Trustee needs to be updated** but the interests will remain under the name of the Trust, please provide GME with the following documentation:
  - Copy of the Trust of Memorandum/Certificate of Trust
  - Death Certificate for the Trustee

When available, please forward all the necessary documents to Grayson Mill Energy at: [relations@gmellc.com](mailto:relations@gmellc.com)