

REQUIRED DOCUMENTS FOR SII CONFIRMATION

Reason for Successor in Interest:

1. Transfer resulting from the death of a co-owner of the property, such as joint tenant or tenant by the entirety

Required Application Documents for All Successors in Interest

- 1. Completed Cover Sheet**
- 2. Notarized Applicant Identification Form**
- 3. Documents below specific to the Reason for Successor in Interest.**

See Below

Specific Successor in Interest Documentation

- 4. Certified copy of the death certificate, and**

- 5. A copy of the most recently executed deed showing (i) that applicant the deceased were joint tenants or tenants by the entirety, (ii) applicant and the deceased held title as community property, or (iii) a transfer of the deceased customer's interest in the property upon death**