

Transfer Procedures On A Joint Tenant Account Where One Owner Is Deceased

1. **A letter of instructions.**

- a. Please give us the name(s), address, and social security numbers of the people receiving the shares.
- b. If the shares are going to the survivor please indicate if change of address and how you want the new certificate sent back.
 - i. If AirBorne, Federal Express, or UPS please provide account number.

2. **Evidence of Death:**

- a. A certified copy of the death certificate.

3. **Inheritance Tax Waiver and Affidavit of Domicile:**

- a. Affidavit of Domicile.
- b. A statement of "no tax due" in lieu of an inheritance tax waiver.

4. **A Stock Power complete with signature and Medallion Signature Guarantee of the surviving tenant is required.**

- a. You may obtain this stamp from your local commercial bank, trust, or brokerage firm.

5. **The original certificate,**

- a. A copy will not be accepted. If you do not have the original you must contact Securities Transfer Corp, the number is provided below.

6. **A transfer fee is required at time of transfer made payable to Securities Transfer Corp.**

- a. Payments we accept: (US dollars please!)
 - i. Check
 - ii. Cashier's Check
 - iii. Money Order

Please send the items to:

**Securities Transfer Corp
2591 Dallas Parkway
Ste 102
Frisco, TX 75034**