

## 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 or 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