

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)**, ExxonMobil 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 or Memorandum / Certificate of Trust
- Tax ID for the new owner (W9)

* 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**, ExxonMobil 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 ExxonMobil with the following documentation:

- Copy of the Trust or Memorandum / Certificate of Trust
- Death Certificate for the Trustee

When available, please forward all the necessary documents to ExxonMobil in the following way:

Email: divorder@exxonmobil.com (scan and attach as a PDF)