



## UPDATING MORTGAGE INFORMATION FOLLOWING A DEATH:

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*Add a successor trustee to receive loan information and manage the account*

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We're very sorry for your loss and understand this may be a difficult time for you. You may have questions about handling the existing mortgage. Maybe you aren't sure where to start or what questions to ask. We're here to help you understand your options, depending on your situation.

In some situations, a successor trustee assumes control of a trust and ensures that the property is distributed and cared for according to the trust. A trust agreement includes the names of the trustees/beneficiaries, describes the trust property and provides the terms of the property transfer.

Use this kit to add a successor trustee to the account. That will allow us to share account information, including statements and correspondence, with that person. However, we cannot issue Form 1098 (Mortgage Interest Statement) if the account is managed by a trust. Contact your tax advisor for more information.

**Please call us with any questions: 1-866-299-6752;** we accept operator relay calls.

**THIS REQUEST DOES NOT  
CHANGE WHO IS  
FINANCIALLY RESPONSIBLE  
FOR THE LOAN.**

Si tiene alguna pregunta, por favor llame al 1-866-299-6752.

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To submit your request, please complete, sign, date and return a completed Cover Sheet with the following items.

- The **certified death certificate** for the deceased customer if you haven't already provided it
- A copy of the **trust agreement** that lists the successor trustee or a copy of the **court order** appointing a successor trustee
- An **executed deed** that shows the property is being transferred into a trust

#### HOW TO SEND

**Fax:**

1-614-422-7575  
It's free from any  
Chase branch

**Mail:**

Chase  
Mail Code LA4-6555  
700 Kansas Lane  
Monroe, LA 71203

**Secure Message:**

Sign in to your chase.com account to upload your documents and send us a message. If you're not an account holder, you'll need to submit documents by fax or mail.

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## FREQUENTLY ASKED QUESTIONS

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### **Does owning a property and being liable for mortgage payments mean the same thing?**

No. You can be the property owner without being liable for making payments. However, the property is still subject to the terms of the mortgage, and payments should be made to keep the loan in good standing.

### **I would like to have financial responsibility for the loan — what do I need to do?**

Please call us at 1-866-299-6752. We will discuss your options with you.

### **Can I receive loan information if I'm not a family member?**

No, unless you are appointed as a fiduciary or successor trustee.

### **Why do you need proof of relationship?**

Protecting our customer's information is important to us. We need to verify your identity to protect against inappropriate use of the account.

### **What can I do with the property?**

If you're taking ownership of the property, you should make payments to keep the account in good standing. If you decide to pay off the account now or later, please call us and we will help you.

### **How do I know if the loan is up to date?**

We can provide the status of the loan and other secure information after we receive your documents and update the account.

### **What will happen if no updates are made to the account or no action is taken?**

The account would remain in the deceased customer's name and stay the way it is today. If there is no remaining living customer on the account, it will be difficult to gain information needed to manage the account to keep it in good standing. If you expect difficulties making payments, call us to see what assistance options we can offer.

### **Can I provide photocopies of the documents you are requesting?**

Yes, we will accept copies. If you're having trouble finding the death certificate, we may be able to help you locate it. Please call us.

### **How do I get a copy of the recorded deed for the property?**

Contact the recorder's office for the county where the property is located.

### **Do you charge a fee for making changes following the death of a customer?**

No.

### **What if I still have questions about a mortgage or home equity line of credit?**

Please call us at 1-866-299-6752; we accept operator relay calls. Or you can send us a message through the message center on [chase.com](https://www.chase.com).

**For more information about your home lending and other Chase accounts, visit [chase.com/EstateServices](https://www.chase.com/EstateServices).**

## COVER SHEET

# UPDATING MORTGAGE INFORMATION FOLLOWING A DEATH

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### PLEASE COMPLETE AND INCLUDE WITH YOUR DOCUMENTS

Date:

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Requestor name:

Relationship to deceased customer(s):

Property address:

Email address:<sup>1</sup>

Loan number:

Phone number:

 |  | 

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#### Secure Message:

Sign in to your chase.com account to upload your documents and send us a message. If you're not an account holder, you'll need to submit documents by fax or mail.

<sup>1</sup>When you give us your email address, we have your permission to contact you at that address about all your Chase or J.P. Morgan accounts. Your consent allows us to use email for informational and account service correspondence, but not for telemarketing or sales emails. It may include contact from companies working on our behalf to service your accounts. You may contact us anytime to change these preferences.