

# Member Request Form



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email: unclaimed@swisherec.org.

Please complete this form so that we have the information needed to answer your questions, reissue checks or make changes to the account. We will contact you based on the information given.

### Account Information

Name on Account: \_\_\_\_\_ Customer Number: \_\_\_\_\_

Last 4 of SSN: \_\_\_\_\_ or Federal Tax ID (if business) \_\_\_\_\_

(If we do not have a SSN# and DL# (or Federal Tax ID (if business)), we will need to update our records when we contact

### Contact Information

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Relationship to Account Holder:

\_\_\_\_\_

(Attach copy of Driver's License)

### Reason for Request

Address Change: \_\_\_\_\_

Legal Name Change (see additional instruction page)

Reissue Check; Reason \_\_\_\_\_

Unclaimed Property Request (see additional instruction page)

Change in Account Ownership Due to Divorce (see additional instruction page)

Change in Account Ownership Due to Death (see additional instruction page)

Disconnect; Meter(s)#: \_\_\_\_\_

Other: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

***Failure to provide complete information will delay processing and response time.***

# Additional Instructions for Requestors

## **Legal Name Change**

Additional Documentation **MUST** be submitted with the request form:

- Marriage License
- Court Order changing individual's name
- Final Divorce Decree

## **Unclaimed Property Request**

• If the requestor is not the same person as the account holder, then please provide legal documentation that the requestor is authorized to collect or obtain information in the unclaimed property on behalf of the account holder.

## **Account Ownership Change Due to Death**

Additional Documentation **MUST** be submitted with the request form:

- Copy of the Death Certificate is **Required** & *one of the additional forms listed below*
- Original Letters Testamentary issued not more than 60 days prior to date of this request
- Original Letters of Administration issued not more than 60 days prior to date of this request and certified copy of the Order Appointing Administrator
- A copy of Trust Agreement and all amendments with identification of the Trustee or Trustees names
- Certified copy of Small Estate Affidavit
- Certified copy of Order Appointing Surviving Spouse as Community Administrator and Proof of bond or waiver of bond
- Certified copy of Order Admitting Will as Muniment of Title
- Certified copy of the Judgement Declaring Heirship
- Certified copy of Affidavit of Heirship