

FAQs – Basic Account Changes and Form Requirements

In compliance with the State of Texas, Sage is required to provide the following information:

Section [91.504](#), Texas Natural Resources Code, gives an owner of a royalty interest in oil or gas produced in Texas the right to request from a payor information about itemized deductions, the heating value of the gas, and the Railroad Commission of Texas identification number for the lease, property, or well that may not have been provided to the royalty interest owner. The request must be in writing and must be made by certified mail. A payor must respond to a request regarding itemized deductions, the heating value of the gas, or the Railroad Commission of Texas identification number by certified mail not later than the 60th day after the date the request is received. An owner of a royalty interest in oil or gas may obtain information regarding production that has been reported to the Railroad Commission of Texas by contacting the oil and gas division of the commission or accessing the commission's website and providing the identification number of the lease and the county in which the lease is located.

Name change due to marriage, divorce or other	Marriage Certificate, Divorce Decree or other document providing recognition of the change
Name change for a company	Certificate recognizing name change and new tax identification number (W-9), if applicable
Power of Attorney or Attorney-in-Fact addition or change	Copy of Power of Attorney or Attorney-in-Fact, or copy of the document effectuating the change in status
Address Change	A written request with the owner number, last four digits of the tax identification number, old and new address, owner signature and date. Find Owner Update Form on our website
Bank Change or Direct Deposit Request/Change	<ul style="list-style-type: none"> - If payment is mailed to a bank or lock box, send the request in writing with the same information for an address change - For direct deposit or to change current account information, complete the ACH Direct Deposit Form found on our website
Purchase or Sale of Interest	Copy of the recorded conveyance from the county or counties in which each property is located
Ownership change due to divorce	Divorce Decree and Settlement Agreement or judgment and the recorded conveyance from the county or counties in which each property is located, if applicable
Ownership change due to gifting of minerals	Copy of the recorded conveyance from the county or counties in which each property is located
Ownership is transferred into a trust	<ul style="list-style-type: none"> - Copy of the Trust Agreement, specifically the pages creating the trust, naming the trustee(s) and successor trustee(s) and the signature page - Copy of the recorded conveyance from the county or counties in which each property is located, if applicable
Ownership is transferred from a trust	<ul style="list-style-type: none"> - Copy of the documents dissolving the trust, if applicable - Copy of the recorded conveyance to beneficiaries from the county or counties in which each property is located - Copy of the Trust Agreement reflecting the powers of the Trustee(s)
Trustee(s) change	Documents accomplishing the change(s) and appointing the new trustee(s)
Death of one Joint Tenant with Right of Survivorship	Death Certificate of Joint Tenant
Death of Co-Tenant Owner – a will is being probated	Copy of each of the following documents: <ul style="list-style-type: none"> - Death Certificate - Will - Order Admitting Will to Probate - Letters Testamentary or Letters of Administration - Final Decree or Judgment of Possession signed by the Court, if applicable - Estate Inheritance Tax Release, if applicable - If the probate is in a state other than where the property is located, a copy of the ancillary probate filed in the county or counties in which each property is located
Death of Co-Tenant owner – no will or will is not being probated	Copy of each of the following documents: <ul style="list-style-type: none"> - Death Certificate - Notarized copy of the Affidavit of Heirship Form. (This form must be recorded in the county or counties in which each property is located) - Copy of Letters of Personal Administration from the Court, if applicable - Copy of the unrecorded Will
Transfer of ownership from an Estate	Copy of the recorded conveyance from the county or counties in which each property is located
Termination of Life Estate	Copy of the death certificate and addresses of designated remaindermen