



TITLE DOCUMENTATION

A generalized guide to common vesting scenarios and the corresponding documentation requirements of Orange Coast Title Company of Southern California ¹

COMMON VESTING EXAMPLES

Joint Tenants ♦ Tenants in Common ♦ Community Property Community Property w/ Right of Survivorship

If all parties are able to act, a one-page confidential statement of information (“SI”) needs to be completed by each individual or couple (if married).

In the event of an owner’s death, contact Orange Coast Title for specific requirements. Depending on conditions, a certified copy of the decedent’s death certificate, an affidavit of death, and/or a court action — such as probate — could be required.

LIVING TRUSTS

If the primary trustee(s) is/are able to act:

1. Confidential statement of information (“SI”) as appropriate
2. Copy of the trust and any amendments thereto. However, a one-page certification of said trust is acceptable if made pursuant to probate code section 18100.5 and qualified as a trust under section 82 of probate code.

In the event of a trustee’s death:

1. SI requirement as above (completed for the deceased by surviving trustee or successor)
2. Copy of the trust and any amendments thereto
3. Certification of Trust (one-page form)
4. Certified copy/original of the decedent’s death certificate
5. Affidavit - Death of Trustee

For more information concerning trusts, refer to Orange Coast Title’s flyer: *Understanding Title Insurance Requirements for Insuring Living Trusts* available at www.octitle.com.

Contact us for all your title needs!

¹ This information is being provided as a courtesy for reference purposes only, is general in nature, and is subject to change at any time. Nothing contained herein should be considered legal and/or tax advice — consult a licensed professional. Orange Coast Title Company, nor its affiliates or agents, shall be liable for any reliance thereon.



CORPORATIONS

1. Articles of Association or Bylaws
2. Certification of good standing from the state in which the corporation resides (requirement for corporations other than California)
3. Corporate resolution(s)
4. Articles of Incorporation (filed with the state)

LLC (Limited Liability Company)

1. Copies of any management agreements or operating agreements together with a current list of all members of said limited liability company
2. Certification of good standing from the state in which the LLC resides
- 2a. Certificate of Registration to transact business in the state of California (if applicable)
3. Articles of Organization certified by authorities from the state of origin

LIMITED & GENERAL PARTNERSHIPS

Limited Partnerships:

1. Certification of good standing from the state
2. Partnership Agreement

General Partnerships:

1. Partnership Agreement (if available - these can be verbal)
*Title will require a document showing who is authorized to sign if no formal agreement has been made in writing.
2. Statement of information from all partners

*Note that General Partnerships do not need to be filed with the state

Thank you for choosing Orange Coast Title Company for all your title needs