



**DOCUMENTATION REQUIREMENTS & INSTRUCTIONS FOR CHANGE OF OWNERSHIP**

Please see below for the documentation necessary to process changes in ownership. If you have any questions, please contact Owner Relations at (214) 297-0500. Once obtained, the relevant documents can be faxed directly to (214) 297-0499, emailed to [land@stewardenergy.com](mailto:land@stewardenergy.com) or mail to Steward Energy II, LLC, Attn: Land Department, 777 Taylor Street, Suite 1050, Fort Worth, TX 76102.

In order to complete this request, and facilitate the transfer of ownership, Steward Energy II, LLC will need copies of the documentation outlined below:

Type:	Situation:	Required Documentation:
<b>Address and Name Changes</b>	<i>Address Change form found on <a href="http://www.stewardenergy.net">www.stewardenergy.net</a> website (Owner Relations tab)</i>	*Address Change request must include your owner number, old address, new address and signature.
	Marriage, Divorce, etc.	*Marriage Certificate *Copy of Recorded Final Divorce Decree, including the Settlement Agreement *Other official documentation affecting name change, i.e. Certified Court Order
	Ownership Change Due to Divorce	*Copy of Recorded Final Divorce Decree, including the Settlement Agreement *(and, if applicable) Copy of Recorded Assignment/Conveyance in the County/Parish where the property is located
	Company or Corporation	*Certificate of Name Change *Tax Identification Number (EIN)
	Merger of Company or Corporation	*Certificate of Merger *Tax Identification Number (EIN)
	Power of Attorney and/or Appointment of AIF (Attorney-in-Fact)	*Copy of Recorded Power of Attorney in the County/Parish where the property is located
<b>Assignments &amp; Conveyances</b>	Any sale, or ownership change, of an Interest	*Copy of Recorded Assignment/Conveyance in the County/Parish where the property is located
<b>Trusts and Partnerships</b>	Creation of a Trust or Partnership <i>Any conveyance/assignment to a Trust or Partnership must name the Trustee.</i>	*Copy of Trust/Partnership Agreement *Copy of Recorded Assignment/Conveyance in the County/Parish where the property is located to the Trustee of a Trust or Partnership
	Termination of a Trust or Partnership	*Dissolution of Trust/Partnership AND, if appropriate, *(and, if applicable) Copy of Recorded Assignment/Conveyance in the County/Parish where the property is located to beneficiary

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# STEWARD ENERGY

	Appointment and/or Change of Trustee(s)	*Copy of Trust/Partnership Agreement Naming or Appointing a Successor
<b>Deceased Individual and Estate Proceedings</b>	Testate (Died with a Will) and Probate Proceedings are being conducted in the State where the property is located	*Death Certificate *Certified Copy of Last Will and Testament *Certified Copy of Letters Testamentary *Certified Copy of Inventory (if any) *Certified Copy of Order Admitting Will to Probate *Recorded Copy, of the Certified Copies above, in the County/Parish where the property is located *Evidence debts and taxes have been paid *Heirs' names, addresses and SSN's *(and, if applicable) Copy of Recorded Assignment/Conveyance in the County/Parish where the property is located to beneficiary
	Testate (Died with a Will) and Probate Proceedings are not being conducted in the State where the property is located	*Ancillary Probate Proceedings opened in state where property is located or the Laws of Descent and Distribution will apply if an Affidavit of Heirship is used to distribute mineral interest
	Intestate (Died without a Will)  <i>See Instructions for the Affidavit of Heirship form found on <a href="http://www.stewardenergy.net">www.stewardenergy.net</a> website (Owner Relations tab).</i>	*Death Certificate *Copy of Recorded Affidavit of Heirship (x2) in the County/Parish where the property is located to beneficiary *Evidence debts and taxes have been paid *Heirs' names, addresses and SSN's
<b>Bankruptcy</b>	Chapter 11	*Plan of Reorganization
	Chapter 7	*Order confirming plan of Reorganization *(and, if applicable) Copy of Recorded Assignment/Conveyance in the County/Parish where the property is located *Order naming Trustee of Bankruptcy Estate

**In order to record a document of Public Record, get in contact with your County Clerk, prior to writing a check, or obtaining a money order, to confirm the amount of the filing fees. You can access the National Association of Counties website to find your relevant county clerk's address and contact information: <http://www.naco.org>**

**Please allow 3 - 5 weeks for our system to be updated with your current information.**

*Any instructions provided by Steward Energy II, LLC are provided for informational purposes only and are based on Steward Energy II, LLC's customary documentation and policy requirements. Documentation and policy requirements may differ based on the facts of each matter. No information or instructions provided by Steward Energy II, LLC constitutes or should be construed as legal advice, and you are encouraged to seek advice from a licensed attorney of your own choosing. Steward Energy II, LLC shall not be responsible for your use of or reliance on any instructions or information provided by Steward Energy II, LLC and you hereby release Steward Energy II, LLC from all such liability and hereby assume any and all risks associated therewith.*

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## **OWNER RESOURCE LINKS**

### **New Mexico**

#### **Lea County, NM County Clerk's Office:**

<https://www.leacounty.net/p/elected-officials/lea-county-clerk>

100 N. Main Avenue, Suite 1C  
P.O. Box 1507  
Lovington, NM 88260

Phone: (575) 396-8619  
Fax: (575) 396-3293

Keith Manes, Lea County Clerk  
Email: [kmanes@leacounty.net](mailto:kmanes@leacounty.net)

Tryon Hassen, Chief Deputy County Clerk  
Email: [thassen@leacounty.net](mailto:thassen@leacounty.net)

#### **Lea County, NM Recording Fees:**

<https://www.leacounty.net/p/elected-officials/lea-county-clerk/recording-fees>

*\*\*All documents recorded in Lea County require a 1 ½ inch margin on every page of the document.\*\**

1 to 10 Index Entries	\$25.00 (NMSA 14-8-15B)
Each additional block of 10 entries	\$25.00 (NMSA 14-8-15C)

#### *Entries to Index are defined as:*

1 Grantor = 1 Entry  
1 Grantee = 1 Entry  
1 Reference = 1 Entry

#### *References are defined as:*

**Legal Description:** If described as a section, township and range, each different section, township and range is counted as a reference. If described as subdivision, each different Tract, Unit or Block. If all references do not have a legal description, then:

**Book and Page reference:** If all references do not have a book and page number, then: State or Federal Lease number. If all references do not have a lease number then: a combination of any of the above in order to index each reference.

#### **State of New Mexico Oil Conservation Division Website:**

<https://www.emnrd.nm.gov/ocd/>



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**Texas**

**Yoakum County, TX County Clerk's Office:**

<http://www.co.yoakum.tx.us/page/yoakum.County.Clerk>

P.O. Box 309  
Plains, Texas 79355

Phone: 806/456-7491 Ext. 294  
FAX: 806-696-8606

Summer Lovelace, Yoakum County Clerk  
Email: [CountyClerk@YoakumCounty.org](mailto:CountyClerk@YoakumCounty.org)

**Yoakum County, TX Recording Fees:**

<http://www.co.yoakum.tx.us/page/yoakum.County.Clerk>

First page	\$25.00
Each additional page or portion of page	\$4.00
Each attachment or rider	\$4.00
Each additional name to be indexed in excess of (5)	\$00.25

**The Railroad Commission of Texas Website:**

<https://www.rrc.texas.gov/>

**STEWARD ENERGY II, LLC**

**Owner Forms and Transfer of Ownership:** <https://stewardenergy.net/owner-forms/>

**Change of Address:** <https://stewardenergy.net/change-of-address/>

**Direct Deposit:** <https://stewardenergy.net/direct-deposit/>





## **AFFIDAVIT OF HEIRSHIP GUIDELINES**

**PLEASE USE THE FOLLOWING GUIDELINES TO ENSURE THE AFFIDAVIT OF HEIRSHIP IS COMPLETED CORRECTLY.**

1. The Affidavit of Heirship CANNOT be filled out by any party who stands to benefit from the Estate. Please refer to your attorney, CPA, other family members, family friend or acquaintance to complete the Affidavit.
2. Once the Affidavit of Heirship is completed, choose a TWO PEOPLE who are familiar with the deceased's family and marital history AND who do not stand to inherit from the deceased. These individuals should read through the completed Affidavit and, if they agree that the information is correct, sign the document before a Notary Public.
3. All signatures in the Affidavit MUST be notarized.
4. The Affidavit MUST be recorded in the county where the wells are located. Call the county clerk's office to inquire about the recording cost of the Affidavit. Remember to enclose your check with the Affidavit.
5. Make sure to include the appropriate legal description for recording if required by the state. Confirm with the county clerk's office the necessary requirements.
6. Keep copies of Affidavits and legal documents for your records.
7. Send Steward Energy II, LLC a copy of the recorded Affidavit, including a legible recorder's stamp, along with any other necessary documentation.

### **PLEASE BE AWARE OF THE FOLLOWING**

1. A recorded Affidavit is required if a Will is not being probated.
2. A recorded Affidavit is required if there is no Will.
3. If the decedent died with a Will and it will be probated, an Affidavit of Heirship cannot be used to transfer interest. Please see the INSTRUCTIONS FOR CHANGE OF OWNERSHIP LETTER.
4. An Affidavit must be filled out by two, disinterested third parties. Or in other words, there must be "two Affidavits for one Estate."
5. The interest will then be transferred according to the Laws of Descent & Distribution by the State where the properties are located.
6. If any heirs of the decedent are deceased, a separate Affidavit of Heirship will be required for each heir.
7. If more space is needed to adequately supply the information requested, please attach a separate sheet of paper.

**Once the requested documentation has been obtained, please forward the information to the following address:**

Steward Energy II, LLC  
ATTN: Land Department  
777 Taylor Street, Suite 1050  
Fort Worth, TX 76102

**Please allow 3 - 5 weeks for our system to be updated with your current information.**

*Any instructions provided by Steward Energy II, LLC are provided for informational purposes only and are based on Steward Energy II, LLC's customary documentation and policy requirements. Documentation and policy requirements may differ based on the facts of each matter. No information or instructions provided by Steward Energy II, LLC constitutes or should be construed as legal advice, and you are encouraged to seek advice from a licensed attorney of your own choosing. Steward Energy II, LLC shall not be responsible for your use of or reliance on any instructions or information provided by Steward Energy II, LLC and you hereby release Steward Energy II, LLC from all such liability and hereby assume any and all risks associated therewith.*

*Call (214) 297-0500, or email [land@stewardenergy.net](mailto:land@stewardenergy.net), for any comments or questions.*

**NOTICE OF CONFIDENTIALITY RIGHTS: IF YOU ARE A NATURAL PERSON, YOU MAY REMOVE OR STRIKE ANY OF THE FOLLOWING INFORMATION FROM THIS INSTRUMENT BEFORE IT IS FILED FOR RECORD IN THE PUBLIC RECORDS: YOUR SOCIAL SECURITY NUMBER OR YOUR DRIVER'S LICENSE NUMBER.**

**AFFIDAVIT OF HEIRSHIP**

STATE OF \_\_\_\_\_ §  
(COMPANY USE ONLY)  
COUNTY OF \_\_\_\_\_ §  
(COMPANY USE ONLY)

**KNOW BY ALL THESE PRESENTS:**

**BEFORE ME**, the undersigned authority, on this day personally appeared \_\_\_\_\_, (the "Affiant") known to me to be a credible and reputable person, and being of lawful age, who after first being duly sworn upon oath, deposes and says:

- 1) Affiant states that Affiant was personally acquainted with information concerning the Estate of \_\_\_\_\_ (**DECEDENT**), during his/her lifetime, having known him/her for a period of \_\_\_\_\_ years, and bearing the following relationship to said decedent, as a \_\_\_\_\_.
- 2) Affiant further states that Affiant was well acquainted with the family, and near relatives, of the Decedent, and the statements herein are based upon the personal knowledge of the Affiant, and to the best of the Affiant's knowledge the statements herein are true and correct.
- 3) The Decedent departed this life at \_\_\_\_\_ in \_\_\_\_\_ County/Parish, of the State of \_\_\_\_\_, on or about \_\_\_\_\_, being \_\_\_\_\_ years old at the date of his/her death.
- 4) The Decedent owned, at the time of his/her death, land situated in \_\_\_\_\_ County/Parish, of the State of \_\_\_\_\_.
- 5) The land described above **was / was not** occupied as the homestead of the Decedent (**circle one**).
- 6) The land described above **is / is not** now occupied as the homestead of the Decedent's surviving **husband / wife** (**circle one**).
- 7) The land described above **was / was not** owned as community property (**circle one**).
- 8) The land described above **is / is not** now owned as community property (**circle one**).
- 9) The Decedent **did / did not** die with a written Will (if yes, attach a copy thereof) (**circle one**).
  - a. If Decedent died with a Will, the Will **has / has not** been admitted to probated, or filed of record, in the State where the above described land is situated (**circle one**). Where was Will first admitted to probate? Give the name of court, and also of the city, county, state and in which court it is located:  
\_\_\_\_\_
  - b. If Decedent died with a Will, and the Will has not been admitted to probate, the family and/or the representatives of the Estate, **have / have no** plans of admitting the Will to be probated (**circle one**).

10) **There is / There is not** any administration pending on the estate of Decedent. To the best of the Affiant's knowledge, the Decedent left no debts unpaid and there are no unpaid Estate or Inheritance Taxes (**circle one**).

11) Provide the following information the Decedent's marital history:

NAME OF SPOUSE	DATE OF MARRIAGE	DATE OF DIVORCE	DATE OF SPOUSE'S DEATH

12) Provide the following information on the Decedent's natural born and adopted children:

NAME OF CHILD / CURRENT ADDRESS	DATE OF BIRTH	NAME OF CHILD'S OTHER PARENT	DATE OF DEATH

13) Provide the following information on the Decedent's grandchildren, born only to the deceased children in Item 12 above:

NAME OF CHILD / CURRENT ADDRESS	DATE OF BIRTH	NAME OF GRANDCHILD'S DECEASED PARENT	DATE OF DEATH

14) If the Decedent never married and did not have any children, provide the following information on the Decedent's parents:

<b>DECEDENT'S PARENTS</b>	<b>PARENT'S NAME / CURRENT ADDRESS</b>	<b>DATE OF DEATH</b>
<b>MOTHER</b>		
<b>FATHER</b>		

15) Provide the following information on the Decedent's brothers and/or sisters:

<b>NAME OF SIBLING / CURRENT ADDRESS</b>	<b>DATE OF BIRTH</b>	<b>NAME OF CHILD'S OTHER PARENT</b>	<b>DATE OF DEATH</b>

16) Provide the following information on the Decedent's nieces and/or nephews born only to the deceased brothers and/or sisters in Item 15 above:

<b>NAME OF NIECE OR NEPHEW / CURRENT ADDRESS</b>	<b>DATE OF BIRTH</b>	<b>NAME OF CHILD'S OTHER PARENT</b>	<b>DATE OF DEATH</b>



17) Further Affiant sayeth not.

Executed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

**AFFIANT:**

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print)

**ACKNOWLEDGEMENT**

STATE OF \_\_\_\_\_ §

§

COUNTY OF \_\_\_\_\_ §

This instrument was acknowledged before me on the \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ by \_\_\_\_\_.

\_\_\_\_\_  
Notary Public State of \_\_\_\_\_  
My commission expires: \_\_\_\_\_