

Chase  
P.O. Box 469030  
Glendale, CO 80246-9030



November 12, 2014

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Mary Jean Parvin  
2 N Avena Avenue  
Lodi, CA 95240-2808

### Your dedicated Customer Assistance Specialist

Account: 706291234  
Property Address: 2 N Avena Avenue  
Lodi, CA 95240-0000

Dear Mary Jean Parvin:

I am writing to introduce myself. As your dedicated Customer Assistance Specialist, I will help with whatever you need as we work on the best option for your mortgage loan.

Call me anytime you have questions or concerns. I am here to make things as easy as possible for you and answer any questions you may have. In addition, I will be in touch with you from time to time to provide updates and remind you about important deadlines.

Here is my contact information:

- **Direct toll-free telephone number:** 877-496-3138 ext. 3284320
- **TTY:** 800-582-0542
- **Address:** Chase  
P.O. Box 469030  
Glendale, CO 80246-9030
- **Fax documents to:** (866)282-5682

**An important note:** If you are not fully satisfied with any aspect of the service you receive from us, please let me know right away. If I am not able to address your concerns, I will put you directly in touch with a supervisor on our team.

I look forward to working with you. In the meantime, please let me know if you have any questions.

Sincerely,

Tashanda Rankin  
Customer Assistance Specialist  
Chase  
877-496-3138 ext. 3284320  
800-582-0542 TTY  
www.chase.com



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## UPDATING MORTGAGE INFORMATION FOLLOWING A DEATH

We're very sorry for your loss and understand this may be a difficult time for you. We're committed to helping you complete your request as quickly and easily as possible.

This guide will help you add an appointed administrator (someone authorized to receive loan information and manage the estate) to a deceased borrower's estate.

Form included:

- Cover Sheet

### WE'RE HERE TO HELP

This guide will walk you through the process, provide and explain the necessary forms and serve as a road map for you to complete your request.

Remember, we're available to answer your questions—call us at **1-800-848-9136** (1-800-582-0542 TTY).

### PLEASE NOTE:

This request doesn't change who is financially responsible for the loan. To do this, you'll need to apply for a loan assumption. Please call us at **1-800-848-9136** to confirm this option is available for this loan type and request an Assumption Application Package.



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## HOW TO REQUEST APPROVAL TO ADD AN IMMEDIATE FAMILY MEMBER(S) TO THE DEED AS A PROPERTY OWNER

This guide will help you request approval to add an immediate family member(s) to the **deed** only, to share ownership of the property. It doesn't remove the original borrower(s) from the loan and won't affect the financial obligation of the borrower(s) on the loan.

Immediate family members include:

- Spouses
- Children
- Parents
- Grandchildren
- Grandparents
- Siblings

### What you need to do:

Please send us:

- ☐ A completed **Cover Sheet** (which is included in this guide)
- ☐ **A written request** to have the immediate family member(s) added to the deed (signed and dated by the borrower making the request)
  - Include the name(s) of the family member(s) being added
- ☐ **Proof of relationship** of the immediate family member(s) to the borrower (for example, a copy of a birth certificate or marriage license)

Once we receive this information, we'll review your request. If it's approved, we'll send you a letter letting you know you can record the proposed deed with the appropriate county clerk's office. If it's not approved, we'll send you a letter explaining why.

#### You can fax or mail these documents to:

##### Fax:

1-614-422-2501

##### Mail:

Chase  
Attn: Name Change Correspondence  
P.O. Box 24696  
Columbus, OH 43224-0696

##### Overnight mail:

Chase (OH4-7302)  
Attn: Name Change Correspondence  
3415 Vision Drive  
Columbus, OH 43219-6009

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**Deed** (for example, warranty or quitclaim deed)—a written document that shows ownership and is used to transfer ownership of a property.

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## FREQUENTLY ASKED QUESTIONS

**I was recently married and I want to change my name on the loan and allow my new spouse to be able to access my loan information. What do I need to do?**

You'll need to make a request to change the name on the loan and authorize your spouse to access loan information. Please call us at 1-800-848-9136 and ask us to send you the Updating Mortgage Information Following a Name Change and Authorizing a Spouse to Receive Loan Information guide.

If you'd like your spouse to become financially responsible for the loan, you'll need to apply for a loan assumption. Please call us at 1-800-848-9136 to request an Assumption Application Package.

**I was recently divorced and awarded our home and property. I want to change my name on the loan and have my ex-spouse removed from the loan. What do I need to do?**

To change your name on the loan, you'll need to make a name change request. Please call us at 1-800-848-9136 and ask us to send you the Updating Mortgage Information Following a Name Change guide.

To remove your ex-spouse from financial responsibility for the loan, you'll need to apply for a loan assumption. Please call us at 1-800-848-9136 to request an Assumption Application Package.

**Can I provide a photocopy of the document you're requesting for proof of relationship?**

Yes, you can just make a copy of this document and send it to us.

**Why are you asking me for proof of relationship?**

We need to verify the identity of the immediate family member(s) to ensure the title/deed transfer is allowed.

**Do you charge a fee for reviewing and approving a title/deed transfer?**

No, we don't charge a fee for making a title/deed transfer.

**What if I still have questions?**

You can call us at 1-800-848-9136 (1-800-582-0542 TTY).