



Notice of Ownership Change

Use this document to provide notice of a change in company ownership.

Changes in ownership may impact your workers compensation policy and the experience modification factor used to determine your premium. Any ownership changes must be reported to us immediately so that we can notify the Workers' Compensation Insurance Rating Bureau of California (WCIRB). In general, an ownership change is the transfer of business operations or assets to another person or business.

For experience rating purposes, a change in ownership involves:

- All or a portion of the ownership in an entity is sold, transferred, or conveyed from one person to another
- An entity is dissolved or non-operative and a new entity is formed
- Two or more corporations undergo a statutory merger or consolidation
- All or most of the tangible or intangible assets of an entity are sold, transferred, or conveyed to another entity
- A trusteeship or receivership is set up, either voluntarily or at the direction of the courts, to operate a business

Please contact your Account Manager at 844-761-8400 if you have any questions.

General Information

Policyholder Name _____
FEIN _____ Policy Number _____

Check one:

- All or some of the ownership in the business was transferred from one group of owners to another
- Most of the business's assets were sold or transferred to another business
- Other (please explain): _____

Date of Ownership Change or Sale _____

Before Ownership Change – Seller Information

Name _____
FEIN _____
Address _____
Legal Nature Please select _____

Entity Details	Owners / Shareholders	% Ownership
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

After Ownership Change – Buyer Information

Name _____
FEIN _____
Address _____
Legal Nature Please select _____

Entity Details	Owners / Shareholders	% Ownership
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Family Rule

Do the Buyer and Seller have a family relationship? Yes No

For these purposes, family relationship is defined as father, mother, husband, wife, registered domestic partner, son, daughter, stepson, stepdaughter, grandson, granddaughter, grandfather or grandmother.

If applicable, please provide details of family relationship: _____

Additional Operations

Are the prior owners still in business? Yes No Unknown

If the prior owners are still in business, did the new owners take most of their employees or only a minority? Yes No

If the prior owners are no longer in business, did the new owners make any drastic staffing changes, or are most of the prior owner's employees now working for the new owners? Yes No

Do the new owners own any other businesses? Yes No Unknown

Description of Change

Please provide an explanation of the change in your own words: _____

Submitter Information

Completed by _____
Title _____

Date _____
Signature _____

Fax the completed form to us at 844-761-8402 or email it to customerrelations@omahanational.com.