Guidelines for Processing Beneficiary Title Transactions

Beneficiary Titling		
Transaction	**Action Taken by CSR**	**Forms required**
Original title • Add Beneficiary at Time of Titling	**N/A** **<<<<<REVISION** If a beneficiary exists on title, remove beneficiary name using Title Maintenance (MV1). **END REVISION>>>>>** *(Request management assistance if not authorized)*	• Assigned certificate of title OR • VSA 17A/VSA 17B, and Acceptable proof of ownership • VSA 18 • Other forms as required for transaction

Original Title
• Transferred to Beneficiary
• Owner Deceased
	Yes
	<<<<<REVISION
	Remove beneficiary using MV1. **END REVISION>>>>>**
	(Request management assistance if not authorized)
	To add co-owners to beneficiary's title
	   • Process Title
	   • Place CUST Held
	   • Add co-owners in MOW
	   • Release CUST Held
		• VA Certificate of Title (no reassignment necessary), OR
		• VSA 17A/VSA 17B, and VSA 12
		• Other forms as required for transaction

Original Title • Transfer to Beneficiary or 3rd Party • Owner Sold or Gifted while Living	**Yes** **<<<<<REVISION** Remove beneficiary using MV1. **END REVISION>>>>>** *(Request management assistance if not authorized)*	• Assigned certificate of title OR • VSA 17A/VSA 17B, and Acceptable proof of ownership • Other forms as required for transaction
Substitute Title **On Existing Title Owner Requests to:** • Add Beneficiary • Change Beneficiary • Remove Beneficiary	**N/A**	• VSA 67 • VSA 18
[1] The system will automatically remove an existing beneficiary from the title record when the vehicle owner titles jointly, or adds a lien.		