

GRANTOR-GRANTEE INDEXING GUIDELINES FOR E-RECORDING CUSTOMERS

1. Use UPPER CASE.
2. Use no punctuation except for hyphens.
3. If your system calls for it, you may use a comma to separate first name & middle initials from the surname (last name).
Example: SMITH, JOHN H *[The comma and a space are used to separate the last name from the first name and middle name or middle initial.]*

4. If your system calls for it, you may have separate fields for the last name, first name and middle name or middle initial. Example:

<i>Last Name</i>	<i>First Name</i>	<i>Middle Initial</i>	<i>Extension</i>
SMITH	JOHN	H	

5. If your system calls for it, when there is a Jr., III, and the like at the end of a name, it may go in the first name field. Examples:
Richard E. Miller III – would be entered as: MILLER, RICHARD E III
John A. Smith, Jr. – would be entered as SMITH, JOHN A JR

6. If your system calls for it, you may have a separate field for extensions such as Jr., III and the like. Example:

<i>Last Name</i>	<i>First Name</i>	<i>Middle Initial</i>	<i>Extension</i>
SMITH	JOHN	H	JR

7. Separate company names when any of a long list of separators is present including “successor to,” aka, fka, nka, etc. Each company name is placed in a separate field, even when the company is no longer technically the grantor or grantee and is given for information only. The abbreviations **themselves** – aka (also known as), fka (formerly known as) and nka (now known as) – should not be included as part of a name in a field.
8. It is helpful to use the exact name of your company and be consistent with the way it is entered every time. NOTE: **Do not begin a company name with an abbreviation – use the full word instead.** Abbreviations are allowed as follows:

WORD OR PHRASE	ABBREVIATION TO USE
And	&
Association	ASSN
Block	BLK
Building	BLDG
Company	CO
Corporations	CORP
Department	DEPT
Division	DIV
Federal Savings Bank	FSB
Incorporated	INC
Limited	LTD
Limited Liability Company	LLC
National Association	NA
National Trust	NT
Savings Association	SA
United States of America	USA

9. It is helpful to give as many of the additional and former names for a company or person as is allowed in your system. This policy is part of our joint “Best Practices” document developed with the Wisconsin Land Title Association.

10. If there are one or more spaces in the last name, everything up to the last space is appended to the first and/or middle name field. A hyphenated surname is treated as one name. Examples:
 - Jane Marie Smith Jones - would be entered as: JONES, JANE MARIE SMITH
 - Jane M. Smith Jones - would be entered as JONES, JANE M SMITH
 - Jane M. Smith-Jones - would be entered as SMITH-JONES, JANE M
11. If this is a last name that has spaces in the middle of the last name, run the entire last name together for ease of retrieval. Examples:
 - Van Camp, Nancy – would be entered as VANCAMP, NANCY
 - Carole J. Ruiz de Chavez – would be entered as RUIZDECHAVEZ, CAROLE J
12. If you are unsure of which of two methods to use, index both ways to be sure that the document is easily retrievable. “Over-indexing” does not hurt and only helps.
13. Proof-read the index information you have entered to make certain it is accurate.

WRDA 10-14-2005

Wis Statutes 59.43(2m) and Chapter 706