

# DOMICILE AFFIDAVIT

STATE OF [STATE] ) ) ss. COUNTY OF [COUNTY WHERE THE AFFIDAVIT IS SIGNED] )

## 1. Affiant

I, [AFFIANT NAME], residing at [AFFIANT ADDRESS], being first duly sworn, depose and state:

1. I am over eighteen (18), of sound mind, and competent to make this Affidavit of Domicile.
2. I am the duly qualified executor, administrator, personal representative, or successor in interest of the Decedent identified below, and I have personal knowledge of the Decedent's domicile at the time of death.

## 2. Purpose

This Affidavit is made to establish the Decedent's state of legal domicile at the time of death for the purpose of transferring, re-registering, or releasing securities, investment accounts, brokerage assets, bonds, stock certificates, and similar financial assets. Specifically: [PURPOSE OF THIS AFFIDAVIT]

## 3. Decedent

1. [DECEDENT S FULL LEGAL NAME] (the "Decedent"), born , died on at [DECEDENT S PLACE OF DEATH CITY].
2. At the time of death, and for a continuous period ending only upon death, the Decedent was a legal resident and domiciliary of the state in which [DECEDENT S DOMICILE LAST RESIDENCE ADDRESS] is located. The Decedent's last domiciliary address was [DECEDENT S DOMICILE LAST RESIDENCE ADDRESS].
3. The Decedent did not, within two (2) years prior to death, claim domicile or residency in any other state upon any tax return, voter registration, homestead declaration, driver's license, will, or similar document executed by the Decedent.

## 4. Assets Subject to This Affidavit

This Affidavit is made to transfer the following investment assets, brokerage positions, stock certificates, bonds, mutual-fund shares, dividend accruals, and similar instruments standing in the Decedent's name:

Any physical certificates evidencing the assets listed above were located within the Decedent's state of domicile at the time of death.

## 5. No Adverse Claim

No state other than the state of the Decedent's domicile has, to my knowledge, asserted or is entitled to assert any inheritance tax, estate tax, or domicile-based claim against the assets identified above that has not been, or will not be, satisfied in the ordinary course of administration.

## 6. Reliance and Indemnification

I understand that this Affidavit will be relied upon by transfer agents, custodians, brokerage firms, and issuing corporations in effecting transfer of the above assets. I agree to indemnify and hold harmless any such party that transfers, releases, or re-registers assets in reliance upon this Affidavit from any loss, claim, or expense arising from such reliance.

## 7. Additional Facts

[NUMBERED FACTS ONE FACT PER PARAGRAPH]

## Oath and Penalty of Perjury

I certify under penalty of perjury under the laws of the State of [STATE] that I know the contents of this Affidavit signed by me and that the statements set forth above are true and correct to the best of my knowledge.

## Signature of Affiant

### Affiant

\_\_\_\_\_ PRINTED NAME

\_\_\_\_\_ SIGNATURE

\_\_\_\_\_ DATE

## Notary Jurat

State of [STATE] County of [COUNTY WHERE THE AFFIDAVIT IS SIGNED]

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20, by [AFFIANT NAME], who is personally known to me or who produced \_\_\_\_\_ as identification.

Notary Public: \_\_\_\_\_ My commission expires: \_\_\_\_\_  
[NOTARY SEAL]

***Jurat vs. acknowledgment.*** This certificate is a ***jurat*** — the correct notarial certificate for an affidavit. A ***jurat*** (i) requires the affiant to appear before the notary, (ii) requires the affiant to sign in the notary's presence (no pre-signing), and (iii) includes administration of an oath or affirmation. An ***acknowledgment*** (used for deeds, powers of attorney, and contracts) does NOT include an oath and is the wrong certificate for an affidavit. Using an acknowledgment in place of a jurat may cause a court to reject the affidavit as defective.