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How to Complete Your Affidavit of Domicile

Sworn Statement of a Deceased Owner's Legal Residence, for Stock and Fund Transfers

INSTRUCTIONS — KEEP FOR YOUR RECORDS. DO NOT ATTACH THIS PAGE TO YOUR AFFIDAVIT OF DOMICILE.

About this form. When someone dies owning stocks, bonds, or mutual funds, the transfer agent (such as Computershare or BNY) usually requires a **notarized** Affidavit of Domicile stating where the person legally lived. The decedent's state of residence determines which state's inheritance rules apply. If the transfer agent sent you its own affidavit, use that form instead.

1. **Confirm your role**
   The executor, administrator, surviving joint owner, or trustee usually signs. Mark the box that describes you.
2. **Enter the decedent's details**
   Full name, date and place of death, and their legal home address at the time of death — where they lived, voted, and filed taxes.
3. **List the securities**
   For each holding, write the company or fund name, the number of shares or units, and the account or certificate number from a recent statement.
4. **Sign under oath in front of a notary**
   The notary will place you under oath and complete the jurat. Do **not** sign ahead of time. Bring a current government-issued photo ID. We come to your home, office, hospital, or care facility.
5. **Medallion Signature Guarantee is separate**
   Most transfer agents also require a **Medallion Signature Guarantee** on their transfer form. Only a bank, credit union, or brokerage can provide it — **a notary seal is not a substitute.** Ask your bank or broker in advance.
6. **Gather the rest of the package**
   Transfer agents usually also ask for a certified death certificate and, for an estate, recent Letters Testamentary or Letters of Administration. Check the agent's instructions.

After It's Notarized

- Send the original to the transfer agent with the rest of its required documents, and keep a copy.
- If the decedent owned shares with more than one company, you may need a separate affidavit for each transfer agent.
- Questions about the estate, taxes, or who inherits should go to an attorney or tax professional.

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SCAN TO BOOK

Questions about this document? Talk to an attorney. Gavrilov & Brooks Law Firm has attorneys licensed in California, Nevada, and other states. Phone and video consultations are available. **(916) 504-0529** · **www.gavrilovlaw.com**

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AFFIDAVIT OF DOMICILE

For Transfer of a Deceased Owner's Securities

State of California)

County of _____) ss.

I, the undersigned affiant, being of legal age and first duly sworn according to law, depose and say:

1. I reside at:

_____ _____

(affiant's full name) (residence address, city, state, ZIP)

and I am the (mark one): ☐ Executor ☐ Administrator ☐ Surviving joint owner ☐ Trustee ☐ Other: _____

of the estate or account of

_____ _____ _____

(full name of decedent) (date of death) (place of death: city, state)

2. At the time of death, the domicile (legal residence) of the decedent was at:

_____ _____ _____ _____

(street address) (city) (county) (state)

3. The decedent resided at that address for approximately _____ years before death, and was not a resident of any other state at the time of death.

4. To the best of my knowledge, all debts of, and taxes and claims against, the decedent's estate have been paid or provided for.

5. This affidavit is made to obtain the transfer of the following securities owned by the decedent at the time of death:

Company / fund name	Number of shares or units	Account or certificate no.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on _____ , at _____

(date) (city and state)

_____ _____

(signature of affiant, in the capacity marked above) (printed name of affiant)

Sign only in front of the notary, who will place you under oath and complete the jurat on the next page.

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JURAT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California)

County of _____)

Subscribed and sworn to (or affirmed) before me on this _____ day of _____ , 20 _____

by _____

(name(s) of signer(s))

proved to me on the basis of satisfactory evidence to be the person(s) who appeared before me.

(Seal)

Signature _____