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How to Complete Your Florida Affidavit of Domicile (Securities Transfer)

Affidavit of Domicile of Decedent (Florida)

INSTRUCTIONS — KEEP FOR YOUR RECORDS. DO NOT ATTACH THIS PAGE TO YOUR DOCUMENT.

About this form. Transfer agents and brokers require an **affidavit of domicile** before they will transfer stocks, bonds, or mutual funds owned by someone who has died. It states where the decedent lived at death. (To declare your own Florida residency, use our Declaration of Domicile.)

1. **Fill in the form**
   Enter the decedent's information and the securities involved, and your role, such as personal representative, trustee, or surviving joint owner.
2. **Check for a Medallion Signature Guarantee**
   Many transfer agents also require a Medallion Signature Guarantee on the stock power, which a bank or broker provides. A notary cannot provide it.
3. **Sign under oath in front of a notary**
   Do not sign ahead of time. The notary places you under oath and completes the jurat. Bring a current, government-issued photo ID such as a driver license, state ID, or passport.

After It's Signed

- Send the affidavit with the death certificate, letters of administration or other proof of authority, and the transfer agent's own forms.

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Have questions about this document? To consult with an attorney, contact **Gavrilov & Brooks Law Firm** at **(916) 504-0529** or **www.gavrilovlaw.com**. Main headquarters: 2315 Capitol Avenue, Sacramento, CA 95816.

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AFFIDAVIT OF DOMICILE

(For Transfer of Securities of a Decedent)

State of _____ County of _____

Before me, the undersigned authority, personally appeared the affiant named below ("Affiant"), who, being first duly sworn, deposes and says:

Name of affiant _____ Address _____

1. Affiant is the (check one):

- ☐ personal representative of the estate
- ☐ successor trustee
- ☐ surviving joint owner
- ☐ other: _____

Describe _____

2. of the following decedent:

Name of decedent _____ Date of death _____ Last four digits of SSN _____

3. At the time of death, the decedent was domiciled at and resided at:

Street address _____ City _____ County _____ State _____

4. The decedent had resided at that address since the following date and did not claim domicile anywhere else:

Since (date) _____

5. The decedent owned the following securities or accounts:

Name of company or fund, account or certificate numbers, and number of shares _____

6. To Affiant's knowledge, the decedent's estate is not subject to any claim of a state other than the state of domicile stated above, and all debts and taxes have been or will be paid.

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Under penalties of perjury, I declare that I have read the foregoing affidavit and that the facts stated in it are true.

Date

X

Signature of affiant

Printed name

JURAT

State of

County of

Sworn to (or affirmed) and subscribed before me by means of

physical presence or

online notarization,

this day of

month

year

by (name of affiant)

Personally Known OR

Produced Identification

Type of identification produced

X

Signature of Notary Public

(Notary seal)

Print, type, or stamp commissioned name of Notary Public

Commission number

Commission expires

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