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# How to Complete a Pennsylvania Affidavit of Domicile

Affidavit of Domicile • Transfer of a decedent's securities

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

**About this form.** Transfer agents and brokerages ask for this sworn statement before they move stocks, bonds or accounts out of a deceased person's name. It confirms where the person lived at death, which tells them which state's tax and probate rules apply.

1. **Identify yourself and your role**
   Executor, administrator, heir, or surviving joint owner.
2. **Enter the decedent's domicile**
   The permanent home address at the time of death.
3. **List the assets**
   Use the issuer name, account or certificate numbers, and share counts from the statement.
4. **Swear to it before a notary**
   Bring a current photo ID. Many transfer agents also require a Medallion signature guarantee, which a notary cannot provide.

**Signing requirements:** Signed under oath or affirmation before a notary (jurat).

## After It's Signed

- Send it with the death certificate, letters, and the transfer agent's own forms.

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**Have questions about your Affidavit of Domicile?** To consult with an attorney, contact **Gavrilov & Brooks Law Firm** at **(916) 504-0529** or **www.gavrilovlaw.com**.

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# AFFIDAVIT OF DOMICILE

Commonwealth of Pennsylvania • For transfer of securities and accounts of a decedent

Affiant name

Capacity (executor, administrator, heir, surviving joint owner)

Affiant address

The affiant, being duly sworn (or affirmed) according to law, deposes and says:

1. The affiant is the person named above and is acting in the capacity stated.
2. The decedent named below died on the date shown and, at the time of death, was domiciled in and a resident of the municipality, county and state stated below:

Decedent full name

Date of death

Decedent's domicile address at death

Municipality

County

State

3. The decedent's domicile was not elsewhere, and the decedent had not voted, filed income tax returns or claimed residence in any other state during the past year, except:

4. Letters testamentary or of administration (check one):

☐ were granted by the Register of Wills of the county named below:

County

Date granted

File no.

☐ have not been granted.

5. The following securities or accounts are to be transferred (issuer, description, number of shares or account number, and value):

6. To the best of the affiant's knowledge, there are no debts of the decedent or claims against the estate that would prevent this transfer, and Pennsylvania inheritance tax due on these assets has been or will be paid.

X

Affiant signature

Date



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**JURAT**

**COMMONWEALTH OF PENNSYLVANIA**

**COUNTY OF** _____

Signed and sworn to (or affirmed) before me on _____ (date) by _____ (name(s) of individual(s) making statement).

**X** _____
Signature of notarial officer

_____
Title of office (e.g., Notary Public)

_____ _____
My commission expires Commission number

(Notary seal)



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