

HARTMAN & WINNICKI, P.C.
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Planning Checklist
For
Changing Domicile to New State

1. Maintain a home in your new state – preferably one you own – and live in it as much of the year as possible.
2. Do not maintain a home in your former state, or downsize to a smaller home.
3. To the extent possible, unless your liability for taxes will be increased significantly thereby, have your earned income paid to you by entities located outside of your former state.
4. File a final income tax return for your former state and cease filing returns for that state or, if you are required to pay tax to your former state, file only non-resident returns.
5. Use your address in your new state on all tax returns, and file your federal returns with the appropriate Internal Revenue Service Center for your new state.
6. File income tax returns each year (if required) for your new state.
7. Register to vote in your new state, and – most importantly – do vote there.
8. Apply for a driver's license in your new state, and register your cars there.
9. Declare your new state to be your residence when renewing your passport.
10. Execute a new will and revocable trust, if applicable, in which you recite that you reside in your new state.
11. Move your important personal possessions to your new state including art, stamp, antique, and coin collections, if any; personal records and mementos; securities and other intangibles (e.g., promissory notes).

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12. If not retired, do as much of your work in your new state and as little in your former state as possible.
13. Move as many of your personal bank accounts as possible to banks in your new state. If you cannot move all of your accounts, notify your banks of your new permanent address in your new state.
14. Rent a safe-deposit box in a bank in your new state. Either give up your former safe-deposit box or, if you must keep it, notify the bank in which it is located of your new permanent address in your new state.
15. Consider making funeral arrangements, including arrangements for interment or disposition of ashes, with a funeral home in your new state.
16. Join social clubs and civic and religious organizations in your new state and resign from social clubs and civic and religious organizations in your former state. If resignation is not convenient, change from resident to nonresident memberships.
17. Consider cutting back on contributions to local charities in your former state. Start contributing to local charities in your new state.
18. If available, file a designation of homestead with respect to your home in your new state.
19. Have prepared and sign an affidavit of domicile, and keep it with your personal papers.
20. Notify your relatives and friends – in writing – of your new home and its address. You may send out printed announcements of your relocation, and if you do so, one such announcement should be saved for your records.
21. Inform your post office in your former state of your change of address, and arrange to have your mail forwarded to your new address. If you have a post office box in your former state, give it up.
22. Declare your new state to be your place of principal residence in any census which is conducted.
23. Describe yourself in all legal documents as residing in your new state.

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24. Declare your new state to be your residence whenever you register in a hotel, rent a car, etc.
25. Establish a relationship with a doctor, dentist, accountant and attorney in your new state.
26. Notify your physician and the members of your family of your intention to make your permanent home in your new state, so that it will be given as your domicile on your death certificate.
27. Change the address which is given for you in business, professional and social directories.
28. Have your address changed on the records of closely-held corporations, partnerships, and other businesses. Have all mail from such entities sent to you in your new state.
29. Cancel charge accounts with stores in your former state, and open accounts with stores in your new state.
30. Notify dividend departments or transfer agents of corporations in which you hold stock of your new address of record and ask to have dividend and interest checks sent to you there.
31. Have all magazines and journals to which you subscribe sent to your new address.
32. Notify the parties listed below of your change of address. Where possible, request that mail no longer be sent to your former address.
 - a. Executors of estates of which you are a beneficiary.
 - b. Trustees of trusts in which you have an interest.
 - c. Parties who are required to pay you annuities.
 - d. Managers of pension and profit-sharing plans in which you have an interest.
 - e. The Social Security Administration, if you are collecting benefits.
 - f. The Veterans Administration, if you are collecting benefits.
 - g. All clubs and associations of which you are a member.
 - h. Gasoline companies, banks, and other entities whose credit cards you hold.
 - i. Banks and other parties having liens or encumbrances on any real estate which you continue to own in your former state.

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- j. Suppliers of fuel oil, electricity, gas, telephone service, and water to any real estate which you own in your former state.
- k. Dairies, gardeners, and companies providing cable T.V., newspaper-delivery, landscaping, snow-shoveling, maintenance, and rubbish-collecting services for any property which you own in your former state.
- l. The office which collects real estate taxes on any property which you own in your former state.
- m. Courts in which lawsuits are pending to which you are a party.
- n. Your tenants and landlords.
- o. Your employees.
- p. Your insurance broker and insurance companies.
- q. Your co-owners of any property – real estate, demand notes, etc.
- r. Your debtors, and individuals or entities which owe you commissions, royalties, or payments of any sort under contracts.