

Factors to Consider in a Change of Domicile to Florida

- Register your vehicles in Florida
- Obtain Florida Driver's License
- Use Florida address when filing your federal tax return.
- Change your voter registration to Florida (and vote there in all future elections)
- Florida library card
- Location of safety deposit boxes
- Florida address on passport
- Update periodicals to Florida address
- Use Florida address on applications (rental cars, hotel registrations)
- Update address with Social Security
- Update address with previous employers regarding pensions and legacy life insurance benefits
- Mail an address change notification to friends and family
- Terminate previous state's EZ Pass Account
- Update documents to reflect Florida address in your Will
- File a declaration of domicile in the Florida County of residence.
- Minimize the time spent in the original state of domicile.
- Disposing of assets in the original state of domicile, or converting them into intangible assets such as family partnerships.
- Filing a homestead exemption for the Florida residence and canceling the exemption in your former state.
- Moving all checking, savings and brokerage accounts to Florida and closing any safety deposit boxes in the original state of domicile.
- Establishing religious and social memberships in Florida and severing them in the original state of domicile by written notification.

A portion of this checklist is an excerpt from an article titled "Resolving (and avoiding) estate tax domicile disputes" that appeared in the Florida Bar News on December 1, 1993. The article was authored by Mr. J. Timothy Leadbeater, Assistant General Counsel, Florida Department of Revenue.