

Domicile Planning: Key Steps to Establish and Support Your Residency

No single factor determines domicile. Evaluate all relevant facts and circumstances to help support your intended residency status.

Establishing and reinforcing your state of domicile can be a critical step in aligning your financial, legal, and tax planning with your intended residency. Taking these actions can help create a clear and consistent record of your move, supporting your position from both an administrative and compliance perspective. The information below is designed to help establish that your transition is well-documented and aligned with your intended domicile.



The “Paper” Trail

Document key changes to help demonstrate a change in domicile.

File a Declaration of Domicile with the Clerk of the Circuit Court in your new county of residence

Obtain a Driver’s License in your new state and surrender your old one generally within 30 days of moving

Register Vehicles & Boats in your new state and obtain insurance policies

Register to Vote in your new state and send a written request to your old state to be removed from their voter rolls

Advise Social Security Administration of change of address

File Federal income tax returns with appropriate IRS office for State of domicile using domicile address on your return

Transact business in new state of domicile if possible



The “Lifestyle” Shift

Establish meaningful connections that reflect your new state as your primary home.

Move “Near and Dear” Items: Transport family heirlooms, art, and photo albums to your new home

Change Professional Ties: Establish relationships with doctors, dentists, lawyers, and accountants based in your new state

Update Estate Planning: Execute estate planning documents, including revocable trusts, wills, powers of attorney and health care directives, drafted by an attorney in your new state, explicitly stating your new domicile

Resign/Reclassify Memberships: Change country club or social club memberships in your old state to “nonresident” status and join local organizations

Financial Migration: Update the address associated with your financial accounts, statements, and bank cards to reflect your new state of domicile.



The “Digital” Defense

Preserve objective records that may support your domicile position over time

Maintain a Contemporaneous Log: Use a residency tracking app to log your location daily via GPS

Check Social Media: Ensure your public “Current City” and posts align with your new location

Audit Your Receipts: Ensure the majority of your daily “life” expenses (groceries, gas, dry cleaning) occur in your new state

Keep your transition on track with a structured outline of key actions designed to help ensure a smooth, well-coordinated move.

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