

## Moving to Florida? A Before-Takeoff Checklist:

The Road to a Florida Domicile

Action	Date Completed
File a Declaration of Domicile (not required, but worth doing)	
Obtain a Florida driver's license and relinquish the other state license	
Register automobiles, boats and other vehicles in Florida and relinquish other state registrations and other state privileges (e.g., parking exemptions, resident fishing and hunting licenses)	
Register to vote and then vote in Florida; notify voting officials of the previous residence	
Update estate planning documents to conform with Florida law and declare Florida as the residence	
List Florida as the residence in all deeds and other documents	
Receive mail at the Florida address	
Open a Florida bank account, change credit card accounts to the new address	
Notify the IRS of the address change; use the Florida address in filing the federal income tax return and, if possible, file final tax returns in the state of previous residence	
File as a nonresident tax return, rather than a resident return, as needed, (e.g., New York income tax return if there is New York income)	
Apply for the Florida Homestead Exemption	
Notify the Social Security Administration of the change of address	
Renew passports in Florida	
Register the Florida address as the primary residence with insurance companies and Medicare	
Obtain a safe deposit box in Florida and move valuables to Florida	
Consider acquiring a larger or more expensive home in Florida, or remodeling or redecorating it, and acquiring a smaller or less expensive home, and document any steps taken in doing so	
Transfer works of art, expensive furniture, heirlooms, and other valuable or sentimental personal items to Florida	
License pets in Florida	
Direct all income, pension, dividend and interest checks and other payments to the Florida address or deposited into a Florida bank account	
Notify social clubs of the Florida address for their membership rolls; affiliate with Florida organizations	
Host family gatherings and social activities in Florida	
Stay in Florida as long as practically possible each year	
Use the Florida residence/address whenever possible (such as when registering at a hotel)	
Consider acquiring cemetery plots in Florida	
If move is recommended by a physician due to health concerns, the physician should document the medical issues accordingly	
Consider using Florida professionals (e.g., physicians, dentists, accountants, and attorneys )	
Abide by the statutory limit for residency (e.g., New York state) and document accordingly. Count your days in new domicile – staying there more than 183 days is very helpful, but staying out of the prior domicile more than 183 days is essential. Vacations count as time away from the new and old domiciles.	

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