

**-THIS IS A SWORN AFFIDAVIT AND MUST BE COMPLETED IN FULL AND EXECUTED BY THE AFFIANT-  
IF EXECUTION IS NOT PERFORMED BEFORE A NOTARY, THEN THIS AFFIDAVIT MUST BE APOSTILLED  
OR LEGALIZED BY A DULY EMPOWERED AUTHORITY IN THE COUNTRY WHERE IT WAS EXECUTED.**

### **AFFIDAVIT OF DECEDENT'S DOMICILE AND GROSS ESTATE ASSETS**

**SWORN IN THE CITY/STATE/TERRITORY OF \_\_\_\_\_ §**

**IN THE COUNTRY OF \_\_\_\_\_ §**

I, \_\_\_\_\_, having been duly sworn, do hereby affirm and state:  
*print name of affiant/signer of affidavit*

**(1)** I am a surviving joint-owner of account(s) \_\_\_\_\_  
*joint-account number(s)*

that I owned together with \_\_\_\_\_ ("Decedent")  
*name of decedent*

who died on \_\_\_\_\_ while residing in \_\_\_\_\_;  
*date of death* *city and country where Decedent resided at death*

**-OR-**

**(2)** I have been duly designated and/or appointed by: \_\_\_\_\_  
*name of court or other authority that confirmed the  
affiant's appointment as executor/administrator or  
beneficiary*

in the city/country of \_\_\_\_\_ as the  Executor/Administrator  
 Beneficiary

for the estate of \_\_\_\_\_ ("Decedent")  
*name of decedent*

who died on \_\_\_\_\_ while residing in \_\_\_\_\_;  
*date of death* *city/country where decedent resided at death*

**-AND-**

**Investment and Insurance Products are:**

- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

(3) On the date of death stated above, Decedent was not: (a) domiciled in, or a resident of, the United States; or (b) engaged in a trade or business in the United States;

(4) No probate or administration proceedings for the estate of the Decedent have been instituted or are pending in the United States; no such proceedings are contemplated; and there are no known creditors or claimants of the Decedent or the Decedent's estate in the United States;

(5) To the best of my knowledge, Decedent executed no will or other instrument within two years prior to Decedent's death in which he/she states that he/she was a resident of any country other than the country of residence stated herein;

(6) In accordance with U.S. Internal Revenue Service ("IRS") guidance issued in connection with IRS Forms 706 or 706NA (as set forth at <http://www.irs.gov/instructions/i706/ch02.html> or <https://www.irs.gov/pub/irs-pdf/i706na.pdf>), whichever being applicable, I have independently, or in consultation with a tax professional determined that the date-of-death value of the Decedent's entire gross estate situated in the U.S. did not exceed U.S. \$60,000.00; and

(7) This Affidavit is made for the purpose of securing the release and transfer/delivery of securities registered in the name of, or owned by, Decedent at the time of his or her death.

Further, I hereby agree that in consideration for your reliance upon the representations herein, the Decedent's estate (if any) and I shall indemnify and hold harmless Wells Fargo Clearing Services, LLC, its agents, employees, officers, directors, subsidiaries, affiliates and parent companies, from and against any loss, liability, expense or claim it incurs or sustains in connection with any action taken in reliance upon the statements made herein including, but not limited to, any tax or other claims that may be asserted by a U.S. tax/revenue agency with respect to the assets of Decedent or Decedent's estate.

Signed: \_\_\_\_\_  
*Affiant Signature*

Date: \_\_\_\_\_  
*MM-DD-YYYY*

Print Name: \_\_\_\_\_  
*Affiant Name*

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**EXECUTED AND SWORN TO BEFORE ME** \_\_\_\_\_  
*Name/Signature of Notary*

on this date: \_\_\_\_\_  
*MM-DD-YYYY*

My commission expires: \_\_\_\_\_  
*MM-DD-YYYY*

**NOTARY'S SEAL**

**\*\*\*MUST BE APOSTILLED OR LEGALIZED IF NOT NOTARIZED\*\*\***