

Documentation Needed

Personal Documents:

1. Original last will (if held by deceased)
2. Original death certificate
3. Original identity document and passport
4. Original marriage certificate, if applicable
5. Certificate of registration of customary marriage, if applicable
6. Original antenuptial contract, if applicable
7. Divorce order and settlement agreement, if applicable
8. Death certificate of predeceased spouses, if applicable
9. Full names of the deceased's parents
10. Full names of the deceased's children (including deceased children)

Assets

1. Fixed properties:

- a. Original Title Deeds / safe custody receipts
- b. Recent home loan statements
- c. Lease agreements
- d. Rates accounts or levy statement or homeowner's statements
- e. Details of any credit life cover
- f. Capital gains tax valuations
- g. Proof of insurance

2. Motor vehicles (incl. trailers, motor bikes, boats, caravans etc):

- a. Registration certificates
- b. Recent statement in respect of any finance
- c. Proof of insurance

3. Firearms:

- a. Original firearm licences
- b. Details of all ammunition held

4. Bank accounts:

- a. Recent bank statements for all accounts
- b. ATM cards

5. Life assurance / endowment / annuity policies:

- a. Original policy documents
- b. Any endorsements or cessions

6. Investments:

- a. collective investment or unit trust statements
- b. Details of any income plan or similar investments
- c. Share portfolio statement
- d. Computershare Investor Services shareholder statement
- e. Share, stock or bond certificates

7. Business interests:

- a. Copy of last set of annual financial statements
- b. Copy of any partnership agreement
- c. Copy of any buy and sell agreement
- d. Company documents
- e. Details of the deceased's accountant/ bookkeeper
- f. Share certificates
- g. Details of any key man policies

8. Other assets:

- a. Timeshare certificates or points statements
- b. Loan account in intervivos trust
- c. Acknowledgement of debt in favour of the deceased
- d. Promissory note in favour of the deceased

Liabilities

1. Personal

- a. Funeral expenses
- b. Medical accounts
- c. Credit cards (including the card itself)
- d. Credit Agreements
- e. Store accounts
- f. Loan accounts
- g. Cell phone account
- h. Telkom account
- i. Electricity Account
- j. Water Account
- k. Internet Service Provider
- l. Newspaper and magazine subscriptions
- m. Suretyships or guarantees by the deceased

2. Tax

- a. Income tax reference number
- b. Copy of last tax return and attachments
- c. Where deceased was registered
- d. Copy of last tax assessment received
- e. Details of the deceased's tax consultant
- f. VAT reference no. (if applicable)



3. General

- a. Insurance policy covering assets
- b. M Net or DSTV subscription
- c. SABC TV licence
- d. Domestic workers:
 - a. Copies of employment contracts
 - b. Copies of identity documents
 - c. Details of UIF payments and registration
- e. Employer or Pensioner:
 - a. Name and address of employer / pension fund
 - b. Employee number / Pension number
 - c. Contact person
- f. Medical Aid:
 - a. Copy of recent medical aid statement
 - b. Reference number

Should you not have any of the above-mentioned documentation at our first consult, please do not worry as we can always collect same from you at a later stage.