



SUGGESTED LIST OF DOCUMENTS AND INFORMATION REQUIRED FOR REPORTING AN ESTATE

Where applicable, the following recommended documents and information must be supplied when you report an estate.

(Please mark with an X.)

RECOMMENDED DOCUMENTS / INFORMATION	ATTACHED	N.A.
Original will		
Original death certificate		
Original Identity document / card of the deceased		
Original letter from treating doctor confirming mental fitness <i>(if undergoing any medical treatment which may affect your mental capacity at the time of signing your will)</i>		
Certified copy of the deceased marriage certificate <i>(if married)</i>		
Certified copy of the deceased ante-nuptial contract <i>(if married out of community of property)</i>		
Copy of divorce order and settlement agreement <i>(if deceased was divorced)</i>		
2 x certified copies of page 1 of identity document of each heir		
2 x certified copies of marriage certificate of each heir <i>(if married)</i>		
Postal address, telephone number, e-mail address and fax number of each heir		
Particulars of estates (full names, date of death, place of death, master office and estate number) of each predeceased spouse <i>(if applicable)</i>		
Original title deed to fixed property <i>(if applicable)</i>		
Original motor vehicle registration certificates		
Original fire-arm licences		
Copy of municipal services and rates accounts		
Original share certificates		
Original policy contracts <i>(only if policies are payable to the estate)</i>		
Information of policies payable to beneficiaries and annuities / retirement annuities		
Copy of salary advice		
Copy of short-term insurance contract		
Copy of hire-purchase agreements		
Full particulars of savings, cheque, transmission and deposit accounts at banks and building societies, as well as books, certificates, cards and cheque books		
Copies of latest bank statements		
Full particulars of the liabilities (creditors), and latest statements		
Income tax reference number		
VAT reference number		
Copy of lease agreement <i>(if applicable)</i>		
Full particulars of medical fund <i>(copy of statement)</i>		
Full particulars of pension fund / employer		
Copy of latest telephone account		
Copy of TV licence		
Full particulars of funeral undertaker <i>(if funeral cost were settled, furnish the receipt or copy)</i>		
In case of death as a result of unnatural causes, the particulars of the SA police office investigating the matter, name and contact detail of the investigating officer and case number		
Detail of any lump sum payments that the deceased received during the previous tax year		
Detail of capital assets disposed of during the last two years (for capital gain tax purposes)		



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FUNERAL POLICY / PLAN



Funeral Policy / Plan

Is there a funeral policy / plan in place? YES / NO

If Yes:

Name of company holding the policy / plan: _____

Funeral Policy / Plan Number: _____

Contact detail to claim Policy: _____

If No:

The family will be required to pay cash for the funeral or burial.

In the event of no cash being available the family can donate the body to medical science.



FUNERAL DIRECTOR

(Funeral director you would like to conduct your service and register the death)

Name: _____

Address: _____

Contact Number: _____

Do you have a POLICY / PREPAID / PRE-ARRANGEMENT with them

Do you wish to be CREMATED / BURIED

CREMATION

Private Cremation with NO Memorial Service

Private Cremation with Memorial Service *(coffin not present at service)*

Attended Cremation where coffin is present at the Memorial Service

Attended Cremation where family and coffin present at Crematorium

Type of Urn wood Eco scatter urn Glass / Porcelain

Urn to be handed over to: _____

Ashes to be Scattered - Location: _____

Interment – Location: _____

Other - _____

BURIAL

Cemetery – Location: _____

Traditional Burial

Tombstone YES / NO

Existing Grave Number: _____

Sea Burial – Location: _____

SERVICE

Type of coffin wood coffin Casket Eco coffin

Viewing – Is a viewing allowed prior to the service YES / NO

Family only those wishing to pay respect

Church / Location: _____

Address: _____

Celebrant / Minister: _____

Eulogy by: _____

Tribute by: _____

Special Verses: _____

Readings: _____

Music: Organist: _____

Pianist: _____

Violinist: _____

Bagpiper: _____

Other: _____

Music Selection: _____

Hymns: _____

Slideshow: Music: _____

Scripture: _____

Poem: _____

Photos: _____

Pallbearers: Name & Surname

Relation

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Flowers: Coffin: YES / NO – Colour: _____

- Qyt: _____

Church: YES / NO – Colour: _____

- Qyt: _____

Rose Stems: YES / NO – Colour: _____

- Qyt: _____

Other: _____

In lieu of flowers donations: _____

Gifts: Candle – Qyt: _____

Bookmarks – Qyt: _____

Balloons – Qyt: _____

Canvas / Photo in frame – Size: _____ / Qyt: _____

Other: _____

Instructions: _____

Dove Release: YES / NO – Colour: _____ / Qyt: _____

Items for Memory Table: _____

Catering required: _____

Special Ceremonies: _____

Cultural Traditions: _____

Charity Donation: _____

Clothing: _____

Organ Donation: _____

Newspaper Notice Death Notice Funeral Notice

Newspaper: _____



LAST WILL
&
TESTAMENT



LAST WILL AND TESYAMENT / EXECUTOR OF MY ESTATE

(Executor will need certain financial information when applying.)

Testament being kept at: _____

Dated: _____

Executor: _____

Address: _____

Contact Number: _____

Email Address: _____

Why you should have a Last Will and Testament?

* Having a will is arguably one of the most important things you can do for yourself and your family. Not only will it legally protect your spouse, children an assets, it will also spell out exactly how you would like things handled after you have passed on.

* You decide how your estate will be distributed. A will is a legally-binding document that lets you determine how you would like your estate to be handled upon your death.

* If you die without a will (in-testate), there is no guarantee that your intended desires will be carried out. Having a will helps minimize any family fights about your estate that may arise, and also determines the “who, what and when” of your estate.

- You decide who will take care of your minor children.

- To avoid a lengthy probate process. Contrary to common belief, all estates must go through the probate process, with or without a will. Having a will, will however, speed up the probate process and informs the court how you'd like your estate divided.

- Minimize estate taxes. The value of what you give away to family members or charity will reduce the value of your estate when it's time to pay estate taxes.

- You decide who will wind up the affairs of your estate. Executors make sure all your affairs are in order, including paying off bills, cancelling credit cards and notifying the bank and other business establishments.

- You can disinherit individuals who would otherwise stand to inherit. Most people do not realize they can disinherit individuals out of their will.

- Make gifts and donations. The ability to make gifts is a good reason to have a will because it allows your legacy to live on and reflect your personal values and interests.

- Avoid greater legal challenges. If you die without a will, part or all your estate may pass to someone you did not intend.

- Because you can change your mind if your life circumstances change. A good reason for having a will is that you can change it at any time while you're still alive.

- Life changes, such as births, deaths and divorce can create situations where changing your will are necessary,

- And lastly drawing up a living will to bring a sense of reassurance to you and your family to your end-of-life wishes.



FINANCIAL INFORMATION

Optional, not relevant to your Funeral Director

** Information below may be required by the executor of your Will.*

BANKING / FINANCIAL INSTITUTIONS

Name: _____ Account Number: _____

Name: _____ Account Number: _____

Name: _____ Account Number: _____

Name: _____ Account Number: _____

LIFE INSURANCE AND POLICIES

Life Insurance: _____ Policy Number: _____

Funeral Policy: _____ Policy Number: _____

Funeral Policy: _____ Policy Number: _____

Unit Trust: _____ Policy Number: _____

Annuities: _____ Policy Number: _____

Pension: _____ Policy Number: _____

Other: _____ Policy Number: _____

Other: _____ Policy Number: _____

SOUTH AFRICAN REVENUE SERVICES

Income Tax Number: _____

Last Assessment: _____ Office: _____

ACCOUNTANT

Name: _____

Telephone Number: _____

Other: _____

STOCKS AND SHARES

Name: _____

Name: _____

Name: _____

Name: _____

DEEDS OF PROPERTY / MORTGAGE DETAIL

PERSONAL DOCUMENTATION

ID document: _____ Location

Birth certificate: _____ Location

Marriage certificate: _____ Location

Passport: _____ Location

Drivers Licence: _____ Location

Pension card: _____ Location

Medical Aid card: _____ Location

Policies: _____ Location

_____ Location

Other: _____ Location

Other: _____ Location

CONTACT LIST OF PEOPLE TO BE INFORMED

Name & Surename	Relation	Contact number / Email address



LIVING WILL



POWER OF ATTORNEY



DEATH CERTIFICATE
&
DEATH NOTICE



PERSONAL DOCUMENTS



PERSONAL INFORMATION / SERVICE

Name & Surname: _____

Address: _____

ID number: _____

Place of Birth: _____

Marriage details: Married _____ Divorced _____ Widowed _____ Single _____

Date of Marriage: _____

SPOUSE

Name & Surname: _____

Address: _____

ID number: _____

Contact number: _____

NEXT OF KIN

Name & Surname: _____

Address: _____

Contact number: _____

Email address: _____

FAMILY DOCTOR

Name: _____

Address: _____

Contact number: _____

Name: _____

Address: _____

Contact number: _____



IDENTITY DOCUMENTS



LABOLA / DOWRY
AGREEMENT



MARRIAGE
CERTIFICATE



DIVORCE PAPERS



BIRTH CERTIFICATE (S)
ADOPTION PAPERS



BANKING DETAILS



TAX INFORMATION



VEHICLE
REGISTRATION PAPERS



FIREARM
LICENSE
REGISTRATIONS



OTHER



SOCIAL MEDIA



WEBSITE	USERNAME & PASSWORD
EMAIL	USERNAME: _____ PASSWORD: _____
FACEBOOK	USERNAME: _____ PASSWORD: _____
SKYPE	USERNAME: _____ PASSWORD: _____

<p>INSTAGRAM</p>	<p>USERNAME: _____</p> <p>PASSWORD: _____</p>
<p>WEBSITE</p>	<p>USERNAME & PASSWORD</p>
<p>_____</p>	<p>USERNAME: _____</p> <p>PASSWORD: _____</p>
<p>_____</p>	<p>USERNAME: _____</p> <p>PASSWORD: _____</p>
<p>_____</p>	<p>USERNAME: _____</p> <p>PASSWORD: _____</p>

<hr/>	USERNAME: _____ PASSWORD: _____
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INVESTMENTS



TITLE DEED(S)



SOCIAL MEDIA



INSURANCE POLICIES



MOVABLE ASSETS



CREDITORS



DEBTORS



SPECIAL INSTRUCTIONS



LETTERS TO
LOVED ONES

