



## The documents that should be in that special file

- Your original Last Will and Testament or, if the original is in safekeeping, a copy of your Last Will and Testament with the name and contact details of the person/entity that has your Last Will and Testament in safekeeping
- A certified copy of your Identity Document
- A certified copy of your Passport
- Certified copies of the Identity Documents of all the members of your family
- Your original Marriage Certificate
- Your original Antenuptial Contract (if you are married out of community of property)
- The original Birth Certificates of your children
- The original Divorce Order or a certified copy thereof (in case you are a divorced person)
- The original Certificate of Registration in respect of each motor vehicle of which you are the registered owner
- The original Title Deed in respect of each immovable property of which you are the registered owner (or co-owner), alternatively a note to that effect if the original Title Deed is being kept by a bank/bondholder or another person/entity
- Your income tax number and contact details of the person/entity that attends to your income tax affairs
- Your original firearm licence/s
- A recent statement in respect of each bank account in your name
- Details of any investments in your name
- The details of any policies and/or annuities in your name
- The contact details of your financial advisor
- The details of a funeral policy
- The details of home owners' insurance
- The details of short term insurance on your vehicle/s and other movables
- The details of your medical aid
- Copies of Lease Agreements in respect of properties that are let/rented
- A list with the contact details of people that have to be contacted in the event of your death
- A letter to your family setting out your wishes as far as a funeral is concerned and, if your remains are to be cremated, where you would like your ashes to be held or scattered

Management services. Administration of deceased estates. Executorships. Deceased estate property transfers. Independent trustee  
Structuring. Tax and investment implications. Drafting of wills. Formation of trusts. Trust tax and fiduciary management  
Deceased estate property transfers. Independent trusteeships. Estates and estate planning and structuring.  
Drafting of wills. Formation of trusts. Trust tax and fiduciary management services. Executorships.

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