



## When an estate is reported kindly provide:

- Original will
- Original death certificate
- Bi1663 - Notification of death form
- Original identity document of the deceased
- Original marriage certificate (if married at time of death)
- Original antenuptial contract (if married out of community of property at the time of death)
- Original identity document of the surviving spouse
- A certified copy of the divorce order and settlement agreement (if the deceased was a divorced person at the time of death)
- A certified copy of every heir's identity document and proof of banking details
- A certified copy of every heir's marriage certificate (if married)
- Contact details (telephone number and email address) of every heir
- Income tax number and the contact details of the bookkeeper / accountant of the deceased
- Original title deed/s (if available)
- Original motor vehicle registration certificate/s
- Original firearm license/s
- Original shares certificate/s
- Complete information in respect of business interests
- Any other documents in respect of assets / investments
- Inventory of moveable assets (furniture / equipment)
- Original policy contracts (if policies are payable to the estate)
- Information regarding policies and annuities
- Copy of latest payslip and the contact details of employer
- Copy of short term insurance contract and the contact details of the broker
- Copies of instalment sales agreement/s
- Full details of all accounts held at banks
- Copies of the latest bank statements of all accounts held at banks
- Full details of medical aid
- Full details of pension fund
- Full details of all liabilities / claims against the estate
- Any other documents pertaining to liabilities / debts
- Copy of municipal account
- Copies of telephone account and TV licence

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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