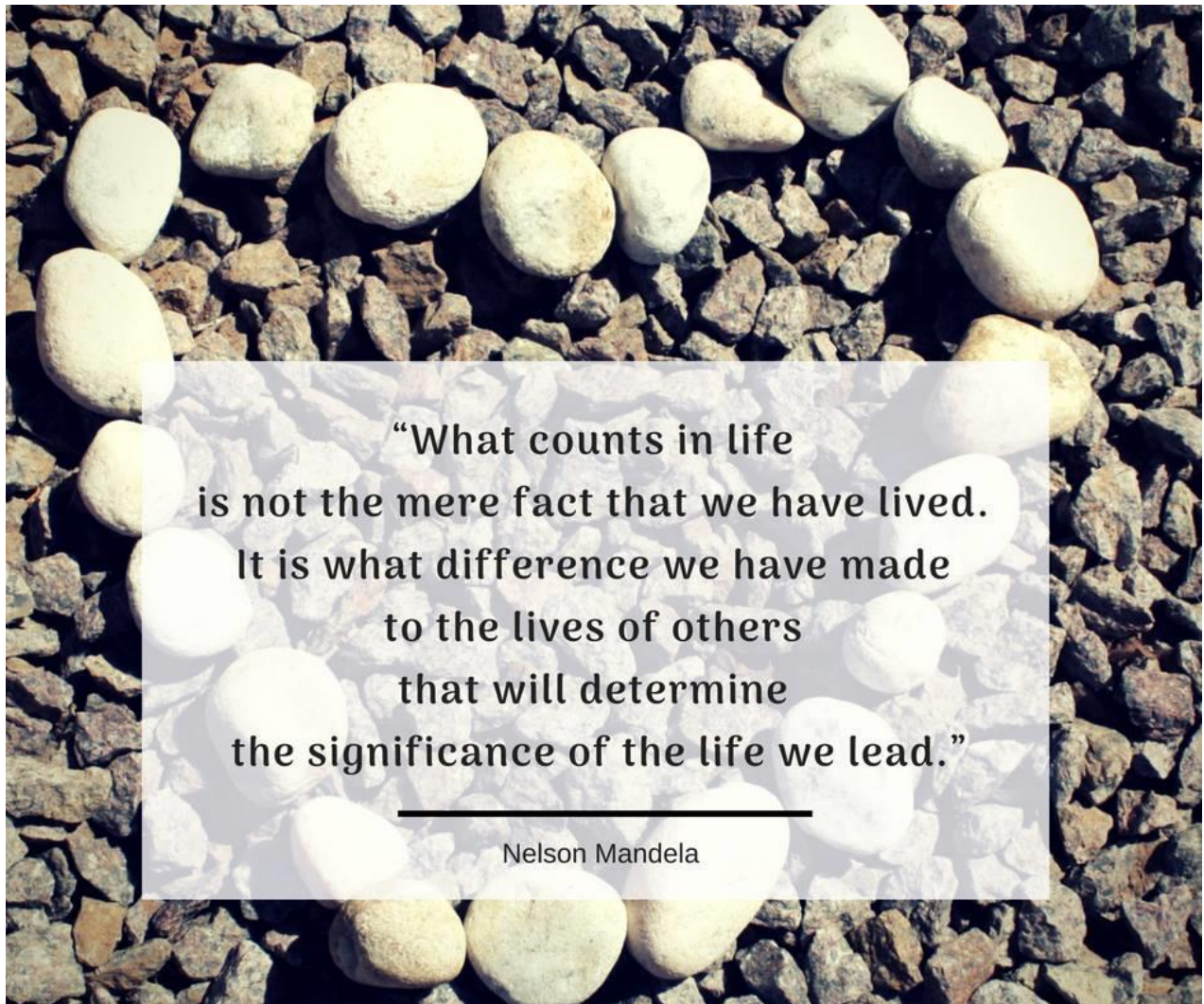


LIFE FILE



HOW WE CAN ASSIST YOU :

- Meeting with family and collect documentation
- Open deceased file with Master
- Submit all documentation to Master
- Advertising estate
- Determine value of assets
- Determine claims for/against estate
- Completing and submitting SARS returns
- Paying all creditors and heirs
- Finalise estate with Master

VALID WILLS :

- Person must be 16 years or older
- Must be in writing
- Each page signed by Testator/Testatrix
- Two witnesses to sign each page
- Witnesses must be 14 years or older

BEST PRACTICE TIPS :

- Wills to be dated
- Witnesses cannot benefit under a will
- Witnesses cannot be nominated as executor, administrator, trustee or guardian
- Pages numbered



1. Personal Information

1.1 ID

1.2 Spouse ID

1.3 Marriage Certificate

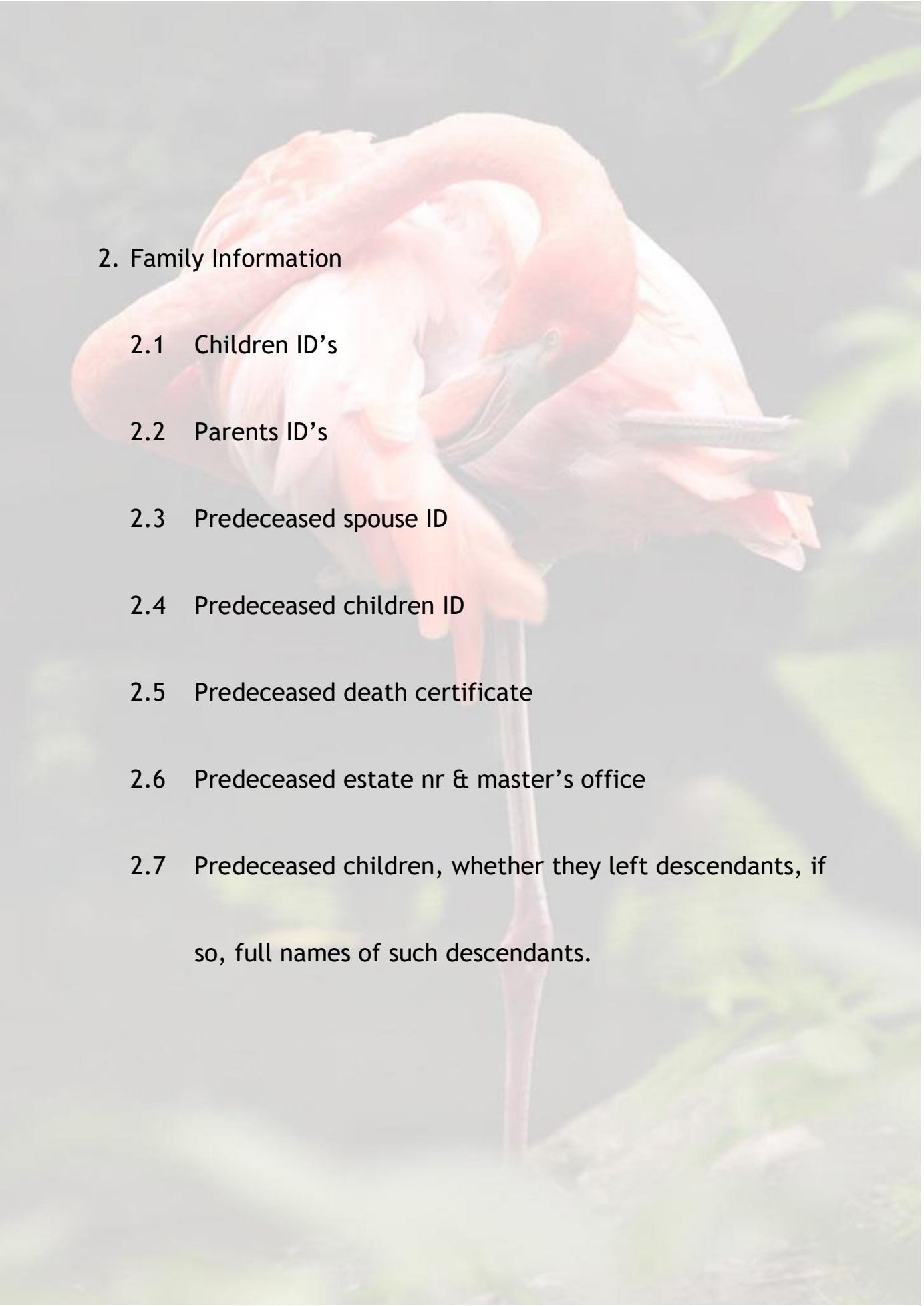
1.4 Marriage Contract

1.5 Divorce order (if divorced)

1.6 Proof of residence (e.g. utility bill)

1.7 Original Will & Letter of wishes

1.8 Details of executor (incl., contact details)



2. Family Information

2.1 Children ID's

2.2 Parents ID's

2.3 Predeceased spouse ID

2.4 Predeceased children ID

2.5 Predeceased death certificate

2.6 Predeceased estate nr & master's office

2.7 Predeceased children, whether they left descendants, if so, full names of such descendants.

3. Funeral

3.1 Funeral policy

3.2 Funeral plan / wishes





4. Assets

- 4.1 Properties - title deeds
- 4.2 Investment properties - title deeds and rental contracts
- 4.3 Motor vehicles - Registration papers
- 4.4 Firearms - copy of licences
- 4.5 Shares in listed companies - share certificates
- 4.6 Shares in private companies - share certificates and
company registration details
- 4.7 Specific collections (e.g. art, jewellery) - valuations

5. Liabilities

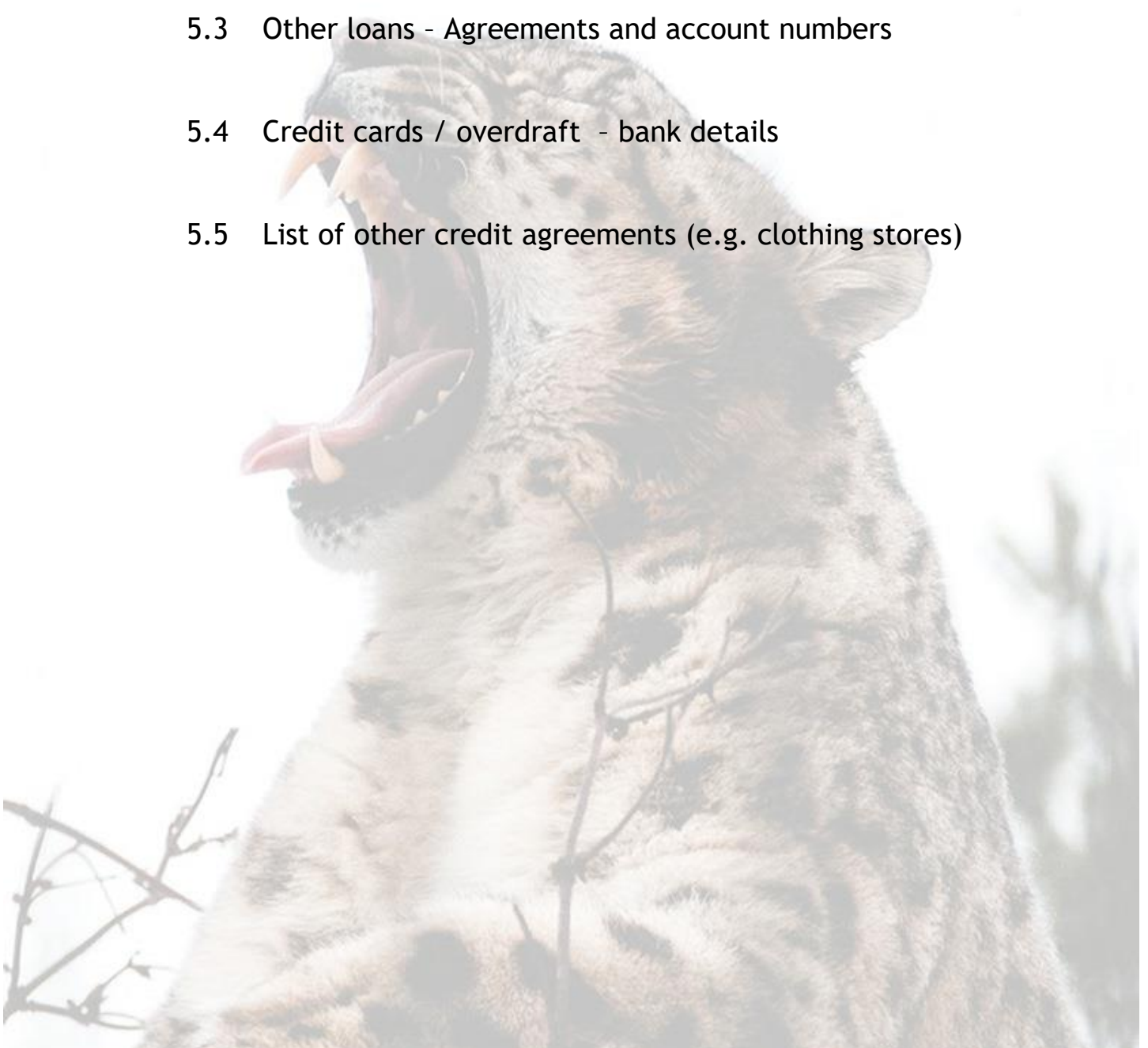
5.1 Properties - details of mortgagee and account number

5.2 Motor vehicles - Loan agreements and account numbers

5.3 Other loans - Agreements and account numbers

5.4 Credit cards / overdraft - bank details

5.5 List of other credit agreements (e.g. clothing stores)



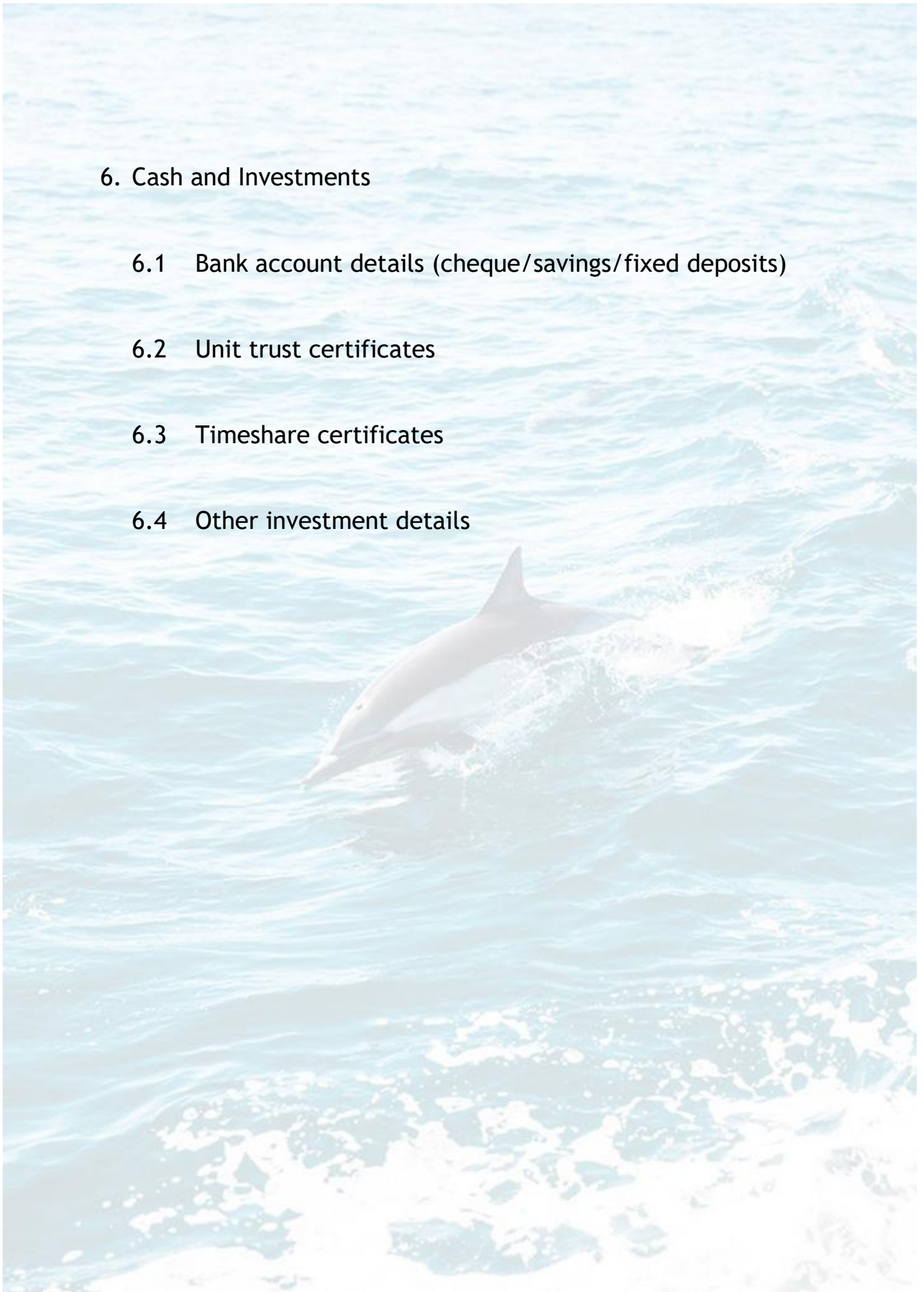
6. Cash and Investments

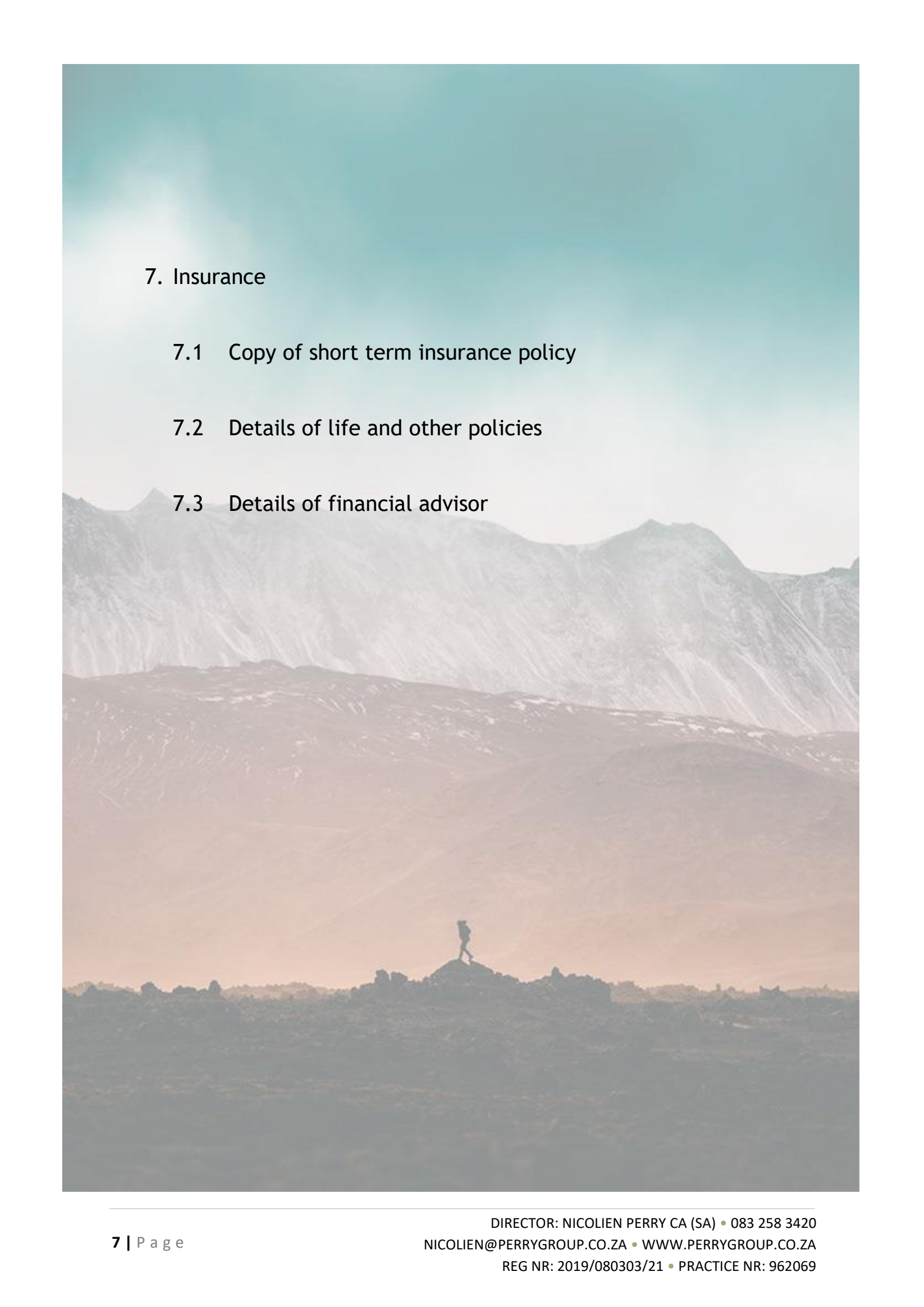
6.1 Bank account details (cheque/savings/fixed deposits)

6.2 Unit trust certificates

6.3 Timeshare certificates

6.4 Other investment details



A scenic landscape photograph serves as the background for the page. It features a person standing on a dark, rocky ridge in the foreground, looking out over a vast, hazy mountain range. The sky is a soft, teal color, and the overall atmosphere is serene and expansive.

7. Insurance

7.1 Copy of short term insurance policy

7.2 Details of life and other policies

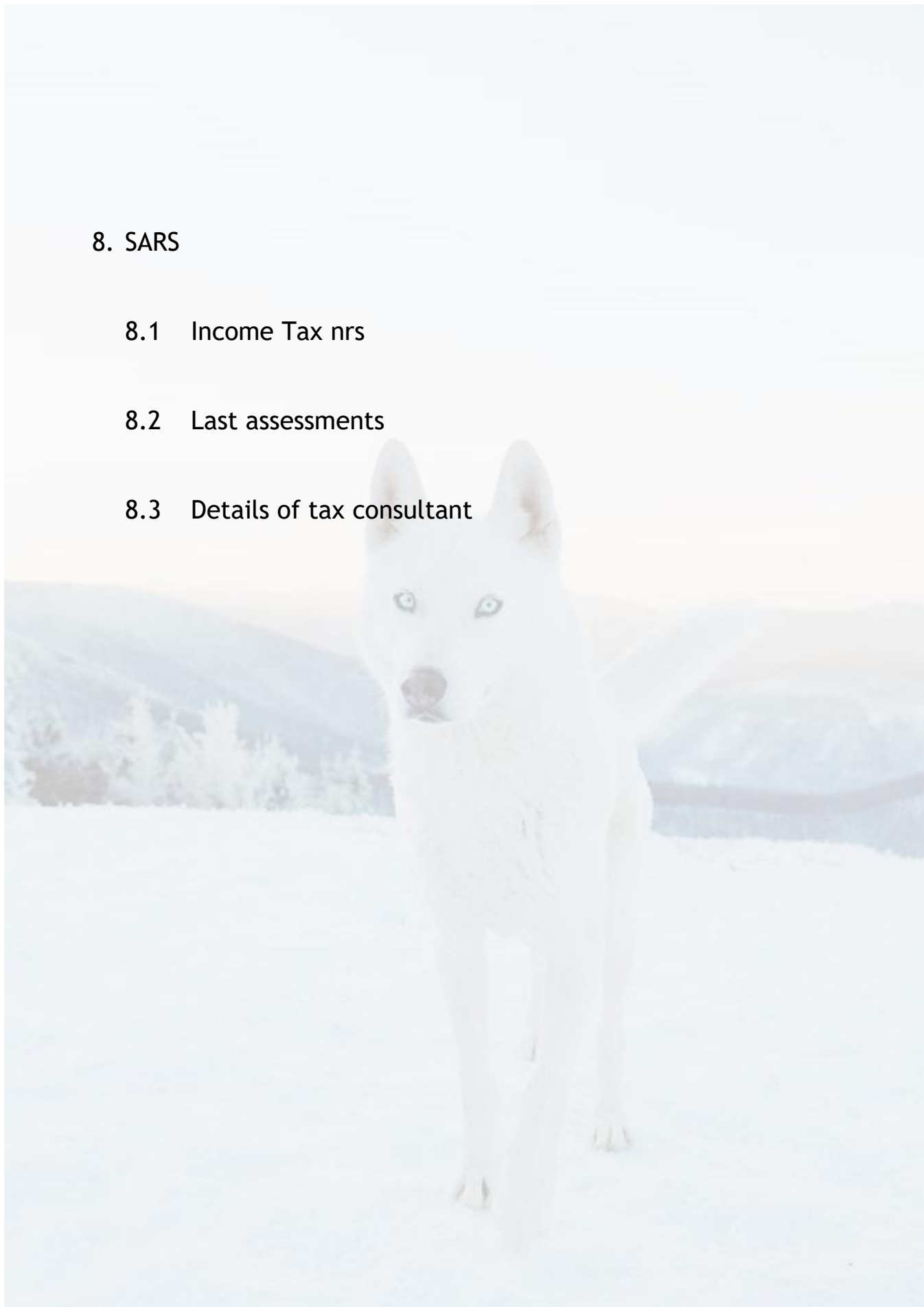
7.3 Details of financial advisor

8. SARS

8.1 Income Tax nrs

8.2 Last assessments

8.3 Details of tax consultant



9. Employer Details

9.1 Name of employer

9.2 Employment contract

9.3 Pension fund name and pension number



10. Other

10.1 Closest family member details

10.2 Medical Aid details

10.3 List of Accounts to pay with account nrs

i. Municipality

ii. TV licence

iii. Department stores

iv. Other

10.4 Accountant details

10.5 Details of fiduciary and usufructuary interest

10.6 Family trust - trust deed

10.7 Passwords