

## DOCUMENTS REQUIRED

### Personal information

1. Identity document – original of the deceased and a certified copy of the surviving spouse
2. Original death certificate
3. BI 1663 (Notification of Death form) – full copy (2-4 pages) obtainable from the funeral parlour
4. Marriage certificate
5. Original antenuptial contract (required by the Master of the High Court)
6. Original divorce order and settlement agreement
7. Original Will
8. Other information required:
  1. If the deceased had been previously married (divorced)
    - Full names of the previous spouse(s)
    - Divorce order and agreement
  2. Predeceased spouse(s)
    - Full names
    - Master's Office where predeceased's estate is registered as well as the estate number(s) (if available)
  3. Date and place of death
  4. Children's full names
  5. Full names of the deceased's parents
  6. Cell phone number of deceased

### Assets

1. Deed of transfer/sectional title/certificate of mineral rights – original documents. If the property is bonded, the original deed of transfer/sectional title should be in safe custody with the mortgager and in this case, you will not be able to furnish us with the original deed.
2. Vehicles – registration certificates of all the vehicles. If any certificate is not available, then a copy of the licence receipt, reflecting details of the vehicle. In the case of a hire purchase agreement IRO a vehicle, the original registration certificate will be at the bank or similar institution and it will be obtained by us once the outstanding amount has been settled, but please furnish us with a copy of the licence receipt in the interim. Kilometre reading.
3. Firearms – licences and confirmation of the whereabouts of the firearms. Heirs will also have to furnish us with written instructions regarding the firearms.
4. Original share, timeshare and other certificates.
5. Timeshare and club points in holiday resort, etc. – copy of the last levy statement.
6. Banking accounts/investments in the name of the deceased
  - Copies of the latest statements of all the accounts in the name of the deceased
  - Savings books / ATM cards
  - Cheque accounts / ATM cards
  - Investments – fixed deposits / participation bonds / unit trusts, etc.
7. Details of all assets in the name of the surviving spouse, in the case of spouses married in community of property, as the assets of the surviving spouse also form part of the joint estate according to the law. Please provide copies of bank statements reflecting the balance on the surviving spouse's bank account as at date of death.
8. Life insurance policies – original policy documents/copies of latest correspondence. For estate duty purposes, we also require details of life insurance policies on the life of the deceased, which has already been paid out as a result of death as well as policies in respect of which the deceased was the owner i.e. children's policies. In case of marriages in community of property, we also require details of the policies IRO which the survivor is the owner.
9. The following valuations:
  - Valuation of the fixed property by an estate agent
  - Valuation of the furniture by two impartial persons i.e. neighbours (NOT replacement value)
  - Valuation of all vehicles in the name of the deceased and surviving spouse (if married in community of property) by a motor dealer.
  - Should any of the heirs be minors, the above valuations will not be required as we will then have to obtain a valuation by an appraiser. An estate agent's valuation is also not necessary if the fixed property forms part of a close corporation or company in respect of which the deceased and/or the surviving spouse (if married in community of property) has/have an interest or shares. This valuation must also be done by an appraiser. In these cases, we will obtain the valuations.

## Heirs

1. Estate beneficiary questionnaire completed by all heirs, as well as copies of the documents referred to in this document.
  - Original certified copy of identity document
  - Original certified copy of marriage certificate (if applicable)
  - Copy of bank statement as confirmation of banking details

## General

1. Television set – Did the deceased possess a television licence? If so, a copy of the licence, reflecting the licence number as well as the names of the person who will be entitled to the television set as we will have to arrange for transfer of the licence in his/her name. Should this person already possess a television licence, please let us have his/her licence number for the purposes of cancellation of the deceased's licence.
2. MultiChoice or cell phone contracts. Please provide copies of the contract/latest statement, reflecting the account numbers. Have arrangements been made for the cancellation/transfer of these contracts and do you require a letter from us as confirmation thereof?
3. Unnatural death – details of police station, investigating officer, case number and autopsy report. Please also complete the affidavit reflecting the cause of death.
4. Lease agreements – copies of the latest statements.
5. Short-term insurance – original policy contract/copies of latest correspondence. If the short-term insurance has already been transferred, we require a copy of the new contract as proof of insurance.
6. Family physician – name, address, telephone and fax number.
7. Employer – employee number, name of employer, address, telephone and fax number of the employer as well as a copy of the last payslip.
8. Pension fund – pension number, name of fund, address, telephone and fax number. Should you be entitled to future pension payments, kindly apply for it as soon as possible.
9. Income tax – income tax number and office, as well as a copy of the last completed return, if available. (If the deceased was not registered as a taxpayer, please confirm his/her yearly income).
10. A list of medical accounts which have not been submitted to the medical aid and which can be claimed for income tax purposes. Accounts submitted to the medical aid, which was not paid or partially paid by them, will be reflected on the medical aid's tax certificate.
11. Medical aid – name and address of the medical aid, the member number as well as the latest statement issued by the medical aid. Should dependants wish to continue as members of the fund, the necessary arrangements must be made with the fund.

## Liabilities

1. Accounts payable by the deceased, including hire purchase contracts, loans, etc. – please provide copies.
2. Funeral account – copy of invoice and proof of payment. If it was paid by someone else, whether a claim will be submitted against the estate in respect thereof.
3. Bondholder – copy of the latest statement/correspondence.
4. Immovable property:
  - Copy of the municipal account (water, electricity and rates & taxes)
  - Copy of a levy statement in the case of a sectional title property, or if not available, contact details of the body corporate.

### NOTE

- *In the case of a marriage in community of property, the assets of both the deceased and the surviving spouse must be reflected.*
- *Any additional details supplied, must be substantiated by documents, if possible.*

Please try to include as many of the abovementioned documents and information as possible to prevent any delays in the administration of the estate. Also remember to complete the necessary forms listed here

Last updated: 09/07/2020