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- Authorised Financial Services Provider (FSP licence number 13566)

**LAST WILL AND TESTAMENT**

**Personal information required for the drafting of a Last Will and Testament**

- Full Name (1) \_\_\_\_\_
- Maiden Surname \_\_\_\_\_
- ID Number \_\_\_\_\_
- Cellphone / contact \_\_\_\_\_
- Email address \_\_\_\_\_
- Tax Number \_\_\_\_\_
  
- Full Name (2) \_\_\_\_\_
- Maiden Surname \_\_\_\_\_
- ID Number \_\_\_\_\_
- Cellphone / contact \_\_\_\_\_
- Email address \_\_\_\_\_
- Tax Number \_\_\_\_\_

■ Current Physical Address:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Postal Address:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

■ Marital Status:

\_\_\_\_\_



- Marital Regime (if applicable): \_\_\_\_\_
- Custom / Religion as it relates to marriage: \_\_\_\_\_
- Name and Place of the Marriage of the Testator: \_\_\_\_\_
- Details of Former Spouses: \_\_\_\_\_
- Do you carry any liability in terms of a divorce order for a former spouse or minor child? \_\_\_\_\_
- Children's details (1)
  - Full name \_\_\_\_\_
  - Date of birth \_\_\_\_\_
  - Marital status \_\_\_\_\_
- Children's details (2)
  - Full name \_\_\_\_\_
  - Date of birth \_\_\_\_\_
  - Marital status \_\_\_\_\_
- Children's details (3)
  - Full name \_\_\_\_\_
  - Date of birth \_\_\_\_\_
  - Marital status \_\_\_\_\_
- Names of Parents of the Testator: \_\_\_\_\_
- Dates of Death: \_\_\_\_\_
- Beneficiaries of the Estate:

<b>Name (%)</b>	<b>ID number</b>	<b>Relationship</b>	<b>Address</b>
_____	_____	_____	_____
_____	_____	_____	_____



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Do you intend your Will to deal with your worldwide assets or do you require a separate Will for foreign assets?

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- Any special bequests / legacies (specific items of jewellery, charities etc):

**Name**

**Bequest**

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- Any cash bequests?:

**Name**

**Bequest amount**

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**Residue distribution for Client (1), if first-dying**  
Client (2) to be the sole beneficiary?

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If not, please provide further detail

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**Residue distribution for Client (2), if first-dying**  
Client (1) to be the sole beneficiary?

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If not, please provide further detail

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**Residue distribution in the event of simultaneous death**

Children to be sole beneficiary(ies)?

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If not, please provide further detail

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**Residue distribution in the event of simultaneous death of the entire family**

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- Testamentary Trust - Formed if beneficiaries are under \_\_\_ years of age

- Name of Trust

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- Age to inherit – 21/25/30 years of age

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- Restrictions / Wider Powers

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- Specific Assets

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- Special needs of children  
*Disability and / or unable to manage his / her inheritance his/ herself.*

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- **Trustees (Substitutes if nominee fails)**

- The trustees are responsible for the administration of the trust property. They must act within the law and must comply with the provisions of the trust deed.*

**Name**

**ID number**

**Relationship**

**Address**

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*If you have minor children and no trust is created, in the event of your death, their inheritance will be converted to cash and held in the Guardians Fund until they attain the age of 18 or until such time that the inheritance can be paid to the biological or legal Guardian on behalf of the minor.*

▪ **Guardians of Children (Substitutes if nominee fails):**

*Guardians are chosen by you to care for your children. They are responsible for your children's physical care, health, education and welfare until they reach an age specified by you. They are not responsible to meet the children's financial needs with their own money. The trustees of the trust ensure the children's financial needs are met in terms of the testamentary trust.*

<b>Name</b>	<b>ID number</b>	<b>Relationship</b>	<b>Address</b>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

▪ **Executor (Substitutes if nominee fails):**

*This is the person responsible for the administration and winding-up of a deceased estate. The executor takes control of the assets in an estate, pays liabilities and distributes the net estate to the beneficiaries in accordance with the last will and testament of the deceased, or according to the rules of intestate succession if there is no will.*

<b>Name</b>	<b>ID Number</b>
_____	_____
_____	_____

▪ **Burial / Cremation – Optional to specify:**

\_\_\_\_\_

▪ **Special Wishes (Pets; Memorial service; Donation of Organs; Living Will/Health Care Declaration):**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



- Additional information and documentation required:
  - Copy of current last will and testament
  - Former name if divorced
  - Details of former spouses
  - Summary of assets and liabilities including policies, pension benefits and trust assets.
  - Copy of Ante nuptial Contract
  - Copies of all IDs
  - Copies of birth certificates of minor children