

### FORMAL DOCUMENTATION

- ☐ Original will and codicils, if any\*
- ☐ Details of the witnesses to the will (if the will was not drafted by STBB)
- ☐ Original death certificate\*
- ☐ Notice of Death / Notice of Still Birth form (DHA-1663)
- ☐ Original identity book of the deceased\*
- ☐ Original identity book of the spouse of the deceased\*
- ☐ Original marriage certificate\*
- ☐ Divorce order in respect of each prior marriage terminated by divorce
- ☐ Antenuptial contract, if any
- ☐ Death certificate of a predeceased spouse

### FOR EACH EXECUTOR

- ☐ Original identity book\*
- ☐ Recent utility bill, e.g. rates, electricity, or telephone account to comply with the provisions of the Financial Intelligence Centre Act 38 of 2001
- ☐ Income tax number

### FOR EACH BENEFICIARY

- ☐ Contact details (preferably an email address and a telephone number) for use during business hours

### ASSETS\*

As much information as possible, including up-to-date documentation where applicable regarding whichever of the following types of assets may have been owned by the deceased:

- ☐ Immovable property
- ☐ Furniture, household effects, jewellery, or Kruger Rands
- ☐ Firearms
- ☐ Motor vehicles
- ☐ Banking accounts, e.g. savings, cheque, fixed deposit, call, or money market. Please provide an up-to-date statement showing a full month of activity on any

savings or cheque account which the deceased used for everyday transactions, e.g. debit orders, payments received from investments and annuities, internet banking, etc

- ☐ Other financial investments, e.g. unit trusts, property syndications, or shares quoted on the stock exchange
- ☐ Private company shares or a member's interest in a close corporation
- ☐ Partnership interests
- ☐ Business in respect of which the deceased was a sole proprietor
- ☐ Insurance policies
- ☐ Annuity policies
- ☐ Monies owing to the deceased by any natural person, trust, company, or close corporation
- ☐ Assets owned in any country other than South Africa
- ☐ Any asset other than the above which may have been owned by the deceased

### LIABILITIES

Please provide as much information as possible, including up-to-date statements where applicable on each of the following debts which may have been owed by the deceased at the date of their death:

- ☐ Mortgage bonds
- ☐ Credit cards
- ☐ Personal loans
- ☐ Store accounts, e.g. Woolworths or Edgars
- ☐ Hire purchase agreements and leases
- ☐ Any other debt not specifically mentioned

### INCOME TAX

- ☐ The deceased's last tax assessment
- ☐ SARS eFiling login details where applicable
- ☐ Name and contact details of any person who may have prepared the tax returns for the deceased

### MEDICAL AID

- ☐ Name and contact details of the deceased's medical aid fund
- ☐ Any medical accounts which must be submitted to medical aid

### PENSION

- ☐ Name and contact details of the deceased's pension fund
- ☐ Pension payment advice

### EMPLOYMENT

- ☐ Name and contact details of the deceased's employer
- ☐ Last pay slip

### GENERAL

If there is anything not mentioned above that you consider important, please bring the relevant information to the consultation.

Items marked with an asterisk (\*) are the most important items and every effort should be made to bring these to the first consultation. However, should any such item be unavailable (e.g. perhaps the death certificate has not yet been issued), it is not necessary to postpone the consultation. It simply means that we would not be able to report the estate to the Master until we have whatever may be outstanding.

### For assistance, contact us at:

**E:** [estates@stbb.co.za](mailto:estates@stbb.co.za)

**T:** 021 673 4700