

**ALK**PROFESSIONAL  
EXECUTORS &  
FIDUCIARY SERVICES

## WILL APPLICATION FORM

**Agent / Financial Planner details (if applicable):**

Name	
Cell phone	
E-mail	
Date	

Will to be drafted in	Afrikaans	<input type="checkbox"/>	English	<input type="checkbox"/>
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Living Will	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Single Will for each party	<input type="checkbox"/>	Combined Will	<input type="checkbox"/>
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**1. MAIN APPLICANT:**

<b>Surname</b>			
Full Names			
ID No		Cellphone	
Tel - Work		Tel - House	
E-mail			

**2. SPOUSE:**

<b>Surname</b>		<b>Maiden Name</b>	
Full Names			
ID No		Cellphone	
Tel - Work		Tel - House	
E-mail			

**3. ADDRESS DETAILS:**

Street Address		
	Postal Code	
Postal Address		
	Postal Code	

**4. MARITAL STATUS:**

Please indicate which of the following is applicable:

Out of Community without accrual	Out of Community with accrual	In Community	Unmarried	Religious Marriage
Divorced	Widow/Widower	Foreign Country	Same Sex Partnership	Customary marriage

**5. CHILDREN:**

(All children, including children out of wedlock, adopted children, and children from previous marriage)

FULL NAMES	ID NO / DATE OF BIRTH

**6. GUARDIANSHIP: (In the event that the children are still minors)**

1. Name, Surname		ID No	
2. Name, Surname		ID No	
Relationship			
Cell numbers	1.	2.	



**7. SPECIAL WISHES:**

	Main Applicant	Spouse
Cremation	<input type="checkbox"/>	<input type="checkbox"/>
Burial	<input type="checkbox"/>	<input type="checkbox"/>
Donation of organs	<input type="checkbox"/>	<input type="checkbox"/>

**8. DOES AGRICULTURAL/FARM LAND FORM PART OF THE ESTATE: YES  NO**

**9. LEGACY:**

Except for the heirs listed in Point 10 hereunder, are there any special bequest of specific assets or cash

Main Applicant	

Spouse	

**10. HEIRS / BENEFICIARIES:**

**If the Main Applicant is first dying** **Spouse to inherit: Yes**

In case of the Spouse not inheriting the estate, list beneficiaries with applicable assets or percentages:


**If the Spouse is the first dying** **Main Applicant to inherit: Yes**

In case of the Main Applicant not inheriting the estate, list beneficiaries with applicable assets or percentages:


**In the event of simultaneous death** **All the children to inherit: Yes**

In case of the children not inheriting the estate, list beneficiaries with applicable assets or percentages:


**In the event of total family demise of Main Applicant, Spouse and children**

List beneficiaries with applicable assets or percentages:




### 11. TESTAMENTARY TRUST

(For minor children, maintenance of parents, maintenance of divorced spouse in terms of a court order, persons with disability, insolvency or bequests to charities)

Name of Trust: \_\_\_\_\_

Reason for Trust	
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Trust for minor		Until what age	21		25		Perpetuity	
Alternative age								

#### 11.1 TRUSTEES:

ALK TO BE NOMINATED AS INDEPENDENT TRUSTEE

Trustee/Co-Trustees:

Surname	
Full Names	
ID No	Cellphone
Tel - Work	Tel - House
E-mail	

Surname	
Full Names	
ID No	Cellphone
Tel - Work	Tel - House
E-mail	

### 12. EXECUTOR:

(Please note that in the event of nomination of a family member, the Master of the High Court will not appoint the nominated person unless that person is qualified to act or is duly assisted by an auditor, attorney or trust institution. ALK has highly qualified members with the necessary experience who is prepared to take nomination as executor / trustee or in capacity as co-executor with the family member. ALK is a member of the Fiduciary Institute of South Africa and is subject to specific guidelines and quality of service.

ALK TO BE NOMINATED AS EXECUTOR  CO-EXECUTOR

Executor/Co-Executor:

Surname	
Full Names	
ID No	Cellphone
Tel - Work	Tel - House
E-mail	

### 13. EXISTING TRUSTS / INTER VIVOS TRUSTS

In the event that a succeeding trustee must be nominated:

All children to be appointed as trustees  All children above certain age to be appointed: age?

Main Applicant / Spouse to nominate?	Name & Number of Trusts	Full names, ID number and relationship of succeeding trustee	RSA resident? (Yes/No)

### 14. OUTSTANDING LOANS / LOAN ACCOUNTS DUE TO MAIN APPLICANT / SPOUSE

List any loans due to the Main Applicant or Spouse by a person, trust or business entity, which must be bequeathed back to that specific person, trust or business entity in order for the loan to be "written off"
