

LIST OF DOCUMENTS REQUIRED TO REPORT AN ESTATE			
PERSONAL DOCUMENTS for DECEASED	Enclosed	Not applicable	To Follow
- Original Death Certificate			
- Original Identity document (or Passport of no ID available)			
- Original Marriage Certificate			
- Certificate of registration of customary marriage			
- Original Antenuptial Contract, if applicable			
- Former spouse(s) / Divorces:			
* Full names and contact details			
* Copy of Divorce Order and Settlement Agreement			
- Predeceased spouse(s):			
* Full names		1	
* Copy of Death Certificate			
* Copy of Last Will and Testament			
* Copy of Liquidation and Distribution Account			
- Full names of the deceased parents			
PERSONAL DOCUMENTS for SURVIVING SPOUSE			
- Original Identity document (or Passport of no ID available)			
- Proof of banking details			
- Income tax reference number			
PERSONAL DOCUMENTS FOR BENEFICIARIES / HEIRS (if not surviving spouse)			
- Copy of identity document			
- Copy of birth certificates (if minors)			
- Original Marriage Certificate			
- Certificate of registration of customary marriage			
- Original Antenuptial Contract			
- Copy of Divorce Order			
- Income tax reference number			
FIXED PROPERTY			
- Original Title Deed / share certificate			
- Recent home loan statement			
- Lease agreements			
- Rates/Water account/levy statement/Electricity account or Prepaid voucher			
- Details of any credit life cover			
- Capital gains tax valuations, if any			
- Proof of insurance			
MOTOR VEHICLES		1	
- Registration certificates			
- Recent statement in respect of any finance			
- Proof of insurance			
FIREARMS			
- Original / Copy of firearm licences	_	1	
- Details of all ammunition held			
- Details of an armitum field - Details of beneficiary		+ +	
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INVESTMENTS / SHARES	4		
- Unit Trust statements		+ -	
- Details of any income plan		1	
- Share portfolio statement		1	
- Computershare Investor Services shareholder statement		1	
- Original share / stock / bond certificates			

BUSINESS INTEREST	•	
- Copy of last set of annual financial statements		
- Copy of any Partnership agreement		
- Copy of any buy and sell agreement		
- CK documents (for Close Corporations)		
- Details of the deceased's accountant / bookkeeper		
- Original share certificate		
- Details of any key man policies		
BANK ACCOUNTS		
- Recent bank statements for all accounts		
- ATM Cards		
LIFE ASSURANCE / ENDOWMENT / RETIREMENT ANNUITIES		
- Original policy documents		
- Any endorsements / cessions		
OTHER ASSETS		
- Timeshare certificates/points statement		
- Recent levy statement		
- Loan account in inter-vivos trust		
- Acknowledgement of debt in favour of the deceased		
LIABILITIES		
Details (and statements) of:		
- Funeral expenses		
- Medical accounts		
- Credit Cards (incl the card itself)		
- Credit Agreements		
- Store accounts		
- Loan accounts		
- Cellphone account		
- Telkom account		
- Internet Service Provider		
- Newspaper / Magazine subscriptions		
- Suretyships / guarantees by the deceased		
TAX		
- Income tax reference number		
- Copy of last tax return and attachments		
- Copy of last tax assessment received		
- Details of the deceased's tax consultant		
- VAT reference no (if applicable)		
GENERAL		
- Mnet / DSTV subscription / SABC TV Licence		
- Domestic worker:		
* Copies of employment contracts		
* Copies of identity documents		
* Details of UIF payments and registration		
- Employer / Pension Fund:		
* Name and address of employer/pension fund		
* Pensioner/employee number		
- Medical Aid:		
* Copy of recent medical aid statement		
* Reference number		