

**LIST OF DOCUMENTS REQUIRED TO REPORT AN ESTATE**

| <b>PERSONAL DOCUMENTS for DECEASED</b>  | <i>Enclosed</i> | <i>Not applicable</i> | <i>To Follow</i> |
|---|-----------------|-----------------------|------------------|
| - 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                                |                 |                       |                  |
| <b>- Former spouse(s) / Divorces:</b>   |                 |                       |                  |
| * Full names and contact details  |                 |                       |                  |
| * Copy of Divorce Order and Settlement Agreement                              |                 |                       |                  |
| <b>- Predeceased spouse(s):</b>   |                 |                       |                  |
| * Full names  |                 |                       |                  |
| * Copy of Death Certificate   |                 |                       |                  |
| * Copy of Last Will and Testament   |                 |                       |                  |
| * Copy of Liquidation and Distribution Account                                |                 |                       |                  |
| - Full names of the deceased parents  |                 |                       |                  |
| <b>PERSONAL DOCUMENTS for SURVIVING SPOUSE</b>                                |                 |                       |                  |
| - Original Identity document (or Passport of no ID available)                 |                 |                       |                  |
| - Proof of banking details  |                 |                       |                  |
| - Income tax reference number   |                 |                       |                  |
| <b>PERSONAL DOCUMENTS FOR BENEFICIARIES / HEIRS (if not surviving spouse)</b> |                 |                       |                  |
| - 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   |                 |                       |                  |
| <b>FIXED PROPERTY</b>   |                 |                       |                  |
| - 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  |                 |                       |                  |
| <b>MOTOR VEHICLES</b>   |                 |                       |                  |
| - Registration certificates   |                 |                       |                  |
| - Recent statement in respect of any finance                                  |                 |                       |                  |
| - Proof of insurance  |                 |                       |                  |
| <b>FIREARMS</b>   |                 |                       |                  |
| - Original / Copy of firearm licences   |                 |                       |                  |
| - Details of all ammunition held  |                 |                       |                  |
| - Details of beneficiary  |                 |                       |                  |
| <b>INVESTMENTS / SHARES</b>   |                 |                       |                  |
| - Unit Trust statements   |                 |                       |                  |
| - Details of any income plan  |                 |                       |                  |
| - Share portfolio statement   |                 |                       |                  |
| - Computershare Investor Services shareholder statement                       |                 |                       |                  |
| - Original share / stock / bond certificates                                  |                 |                       |                  |

