



ALK

PROFESSIONAL
EXECUTORS &
FIDUCIARY SERVICES

DECEASED ESTATE

ESTATE LATE _____

Date: _____

- 1) Initial(s) & surname of deceased _____
ID No. _____ Copy of ID received _____ Income Tax: _____
- 2) Does the deceased have a will? _____ Original Received: _____ Dated: _____
- 3) If yes, who has been nominated as executor? _____
- 4) If no, who is going to be nominated as executor? _____
- 5) Contact details of nominated executor _____
- 6) Relationship of executor to the deceased? _____
(Parent / surviving spouse / child of deceased – no security required)
- 7) Does the will grant the power of assumption? _____
- 8) Does the will exempt the executor from the obligation to provide security? _____
- 9) Nationality of the deceased (if not South African) _____
- 10) Last occupation of the deceased _____
- 11) Last Employer of deceased: _____
- 12) Residential address/addresses of the deceased during the 12 months prior to death –

- 13) Place of birth of the deceased _____
- 14) Where is Original death certificate for the deceased _____
- 15) Marital status at time of death _____ Place of marriage _____
- 16) Initial(s) & surname of surviving spouse _____
ID No. _____ Copy of ID _____ Contact No: _____
E-mail address: _____
- 17) Parents of deceased: Mother _____ Father _____
Predeceased _____



- 18) Residential address of surviving spouse, if different from residential address of the deceased:

- 19) Last occupation of surviving spouse _____
- 20) Initial(s) & surname(s) of predeceased spouse(s) and/or divorced spouse(s) (state predeceased / divorced)

- 21) Date of death of predeceased spouse(s) _____ Master's office: _____
- 22) Initial(s) & surname of child of deceased _____
ID No. _____ Provide Copy of ID ____ Minor: ____ Alive / Deceased _____
Initial(s) & surname of child of deceased _____
ID No. _____ Provide Copy of ID ____ Minor: ____ Alive / Deceased _____
Initial(s) & surname of child of deceased _____
ID No. _____ Provide Copy of ID ____ Minor: ____ Alive / Deceased _____
Initial(s) & surname of child of deceased _____
ID No. _____ Provide Copy of ID ____ Minor: ____ Alive / Deceased _____
Initial(s) & surname of child of deceased _____
- 23) Initial(s) & surname of person signing the death notice _____
ID No. _____ Copy of ID _____ Capacity _____
- 24) Was the signatory present at the deceased's death? _____
- 25) Did the signatory identify the deceased after his death? _____
- 26) Immovable property owned by the deceased – description & value

- 27) Movable property owned by the deceased – description & value



28) Claims in favour of the estate (including bank accounts) – description & value

29) Any subscriptions, insurance, other contracts that should be transferred to the surviving spouse:

30) Notes:
