

EVERYTHING
YOU WILL NEED
TO REPORT &
WRAP UP MY
ESTATE



NAME & SURNAME



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PERSONAL IDENTIFICATION DOCUMENTS

Keep the following certified copies in your file.

- Your Identity Documents (6 Certified Copies recommended)
- Marriage Certificate (At least 2 Certified Copies included)
- Decree of divorce/s (any previous marriage divorce decrees)
- Antenuptial Contract (and the commencement values)
- Children's Birth Certificates and or ID's (at least 2 certified Copies)
- Death Certificates (of any deceased spouses or children if applicable)
- Passport Copies (certified if you have any)
- Your Last Will & Testament (if you have the original), if not the executors details should be included here as to contact him/her.
- Living Will if you have one
- Organ Donation Card if applicable

TIP: Include your executors or attorneys details.



- Latest 3 months bank statements (updated once a year)
- Bank account details of all active bank accounts
- Credit Card Accounts, overdraft facilities and loan statements.
- Do they have credit protection in the event of death? Include a note if you do have it.
- Mortgage bond Statements (for each property owned)
- Vehicle Finance or asset finance agreements
- Recent Payslip or proof of income
- Income tax details (include 2 years income tax assessments, efilling details and tax practitioner if you have one).



- Title Deeds or certified copies thereof
- Municipal rates and taxes accounts
- Levy Statements (if sectional title properties)
- Mortgage Statements
- Rental Agreements (for any rental properties)
- Insurance policies such as homeowners insurance and mortgage protection)





- A List of the Items, Such as watches, jewelry, collectables and art, and their valuations (include a valuation certificate)
- Gold Coins, their inventory and values
- Motor vehicle registration papers (if paid off) if not a finance statement
- A List of Firearms, and include their detailed descriptions and serial numbers.
- 2 Certified Copies of firearm licenses
- Boat, Caravan or other asset registrations

TIP: Draft an Inventory list of all personal items of value, which should reflect a realistic view of what it all would be worth.

Updated it annually, or each time a new item is added or sold



- Full Life Insurance and Retirement Annuity Schedule
- Pension or Provident Fund statements
- Tax Free Savings Account Statements
- Unit Trusts, share portfolios, or ETF's
- Crypto Holdings (include the wallet addresses, exchange accounts and access instructions)
- Any other direct shares including share certificates or statements.
- Declaration or holding in any business venture

TIP: Include the contact details of the Financial Planner for personal insurance and investments
Include the HR or Company Contact person for any Pension or Provident Fund related Claims



- List all of the digital media you are subscribed to or have profiles with.
- Usernames and Passwords (to deactivate and close the accounts).
- Instructions to deactivate or memorialize accounts (Facebook, LinkedIn, Instagram)
- Cloud Storage and photo account access details (Google, Apple, Dropbox etc)

PERSONAL AND FAMILY INFORMATION

- Contact List of key family members and or beneficiaries
- Medical aid membership card, and gap cover details
- Pet Information (vet, feeding routines and inoculation book)
- Write some letters to persons of value. This is your final goodbye to them. Address it to them in a sealed envelope and put it in your folder.

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