

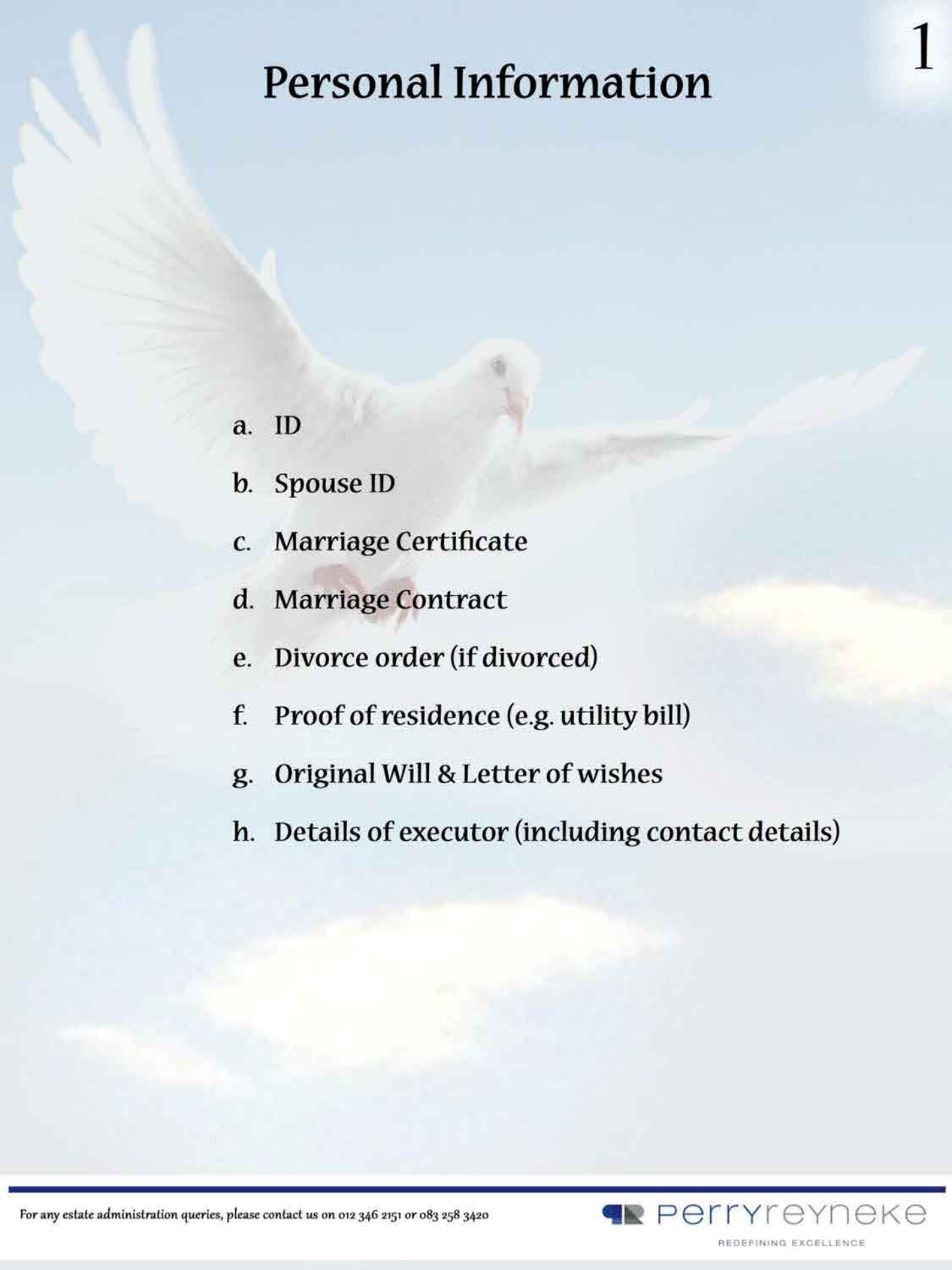


Life File

Index

1. **Personal Information:**
 - a. ID
 - b. Spouse ID
 - c. Marriage Certificate
 - d. Marriage Contract
 - e. Divorce order (if divorced)
 - f. Proof of residence (e.g. utility bill)
 - g. Original Will & Letter of wishes
 - h. Details of executor (including contact details)
2. **Family Information**
 - a. Children IDs
 - b. Parents ID's
 - c. Predeceased spouse ID
 - d. Predeceased children ID
 - e. Predeceased death certificate
 - f. Predeceased estate nr & master's office
 - g. Predeceased children, whether they left descendants, if so, full names of such descendants
3. **Funeral**
 - a. Funeral policy
 - b. Funeral plan / wishes
4. **Assets**
 - a. Properties - title deeds
 - b. Investment properties - title deeds and rental contracts
 - c. Motor vehicles - Registration papers
 - d. Firearms - copy of licences
 - e. Shares in listed companies - share certificates
 - f. Shares in private companies - share certificates and company registration details
 - g. Specific collections (e.g. art, jewellery, etc.) - valuations
5. **Liabilities**
 - a. Properties - details of mortgagee and account number
 - b. Motor vehicles - loan agreements and account numbers
 - c. Other loans - agreements and account numbers
 - d. Credit cards / overdraft - bank details
 - e. List of other credit agreements (e.g. clothing stores)
6. **Cash and Investments**
 - a. Bank account details (cheque / savings / fixed deposits)
 - b. Unit trust certificates
 - c. Timeshare certificates
7. **Insurance**
 - a. Copy of short term insurance policy
 - b. Details of life and other policies
 - c. Details of financial advisor
8. **SARS**
 - a. Income Tax numbers
 - b. Last assessments
 - c. Details of tax consultant
9. **Employer Details**
 - a. Name of employer
 - b. Employment contract
 - c. Pension fund name and pension number
10. **Other**
 - a. Closest family member details
 - b. Medical Aid details
 - c. TV licence
 - d. Accountant details
 - e. Details of fiduciary and usufructuary interest
 - f. Family trust - trust deed

Personal Information

- 
- a. ID
 - b. Spouse ID
 - c. Marriage Certificate
 - d. Marriage Contract
 - e. Divorce order (if divorced)
 - f. Proof of residence (e.g. utility bill)
 - g. Original Will & Letter of wishes
 - h. Details of executor (including contact details)

Family Information

- a. Children ID's
- b Parents ID's
- c Predeceased spouse ID
- d. Predeceased children ID
- e. Predeceased death certificate
- f. Predeceased estate nr & master's office
- g. Predeceased children, whether they left descendants, if so, full names of such descendants

Funeral

- a. Funeral policy
- b. Funeral plan / wishes

Assets

- a. Properties - title deeds
- b. Investment properties - title deeds and rental contracts
- c. Motor vehicles - Registration papers
- d. Firearms - copy of licences
- e. Shares in listed companies - share certificates
- f. Shares in private companies - share certificates and company registration details
- g. Specific collections (e.g. art, jewellery, etc.) - valuations

Liabilities

- a. Properties - details of mortgagee and account number
- b. Motor vehicles - loan agreements and account numbers
- c. Other loans - agreements and account numbers
- d. Credit cards / overdraft - bank details
- e. List of other credit agreements (e.g. clothing stores)

Cash & Investments

- a. **Bank account details**
(cheque / savings / fixed deposits)
- b. **Unit trust certificates**
- c. **Timeshare certificates**

Insurance

- a. Copy of short term insurance policy
- b. Details of life and other policies
- c. Details of financial advisor

- a. **Income Tax numbers**
- b. **Last assessments**
- c. **Details of tax consultant**

Employer Details

- a. Name of employer
- b. Employment contract
- c. Pension fund name and pension number

Other

- a. **Closest family member details**
- b. **Medical Aid details**
- c. **TV licence**
- d. **Accountant details**
- e. **Details of fiduciary and usufructuary interest**
- f. **Family trust - trust deed**