



Deceased Estate Administration

-Document Checklist

MAKE SURE YOU HAVE THE FOLLOWING DOCUMENTS:

- ☐ Original Death Certificate
- ☐ Original Last Will and Testament (if applicable)
- ☐ Original Identity document and passport
- ☐ Original Marriage Certificate (or certificate of registration of customary marriage) (if applicable)
- ☐ Original Antenuptial Contract (if applicable)
- ☐ Former spouse(s) details, if divorced:
 - ☐ full names and contact details
 - ☐ copy of divorce order
 - ☐ copy of divorce agreement
- ☐ Predeceased spouse(s) details (if applicable)
 - ☐ full names
 - ☐ copy of death certificate
- ☐ Master's office where estate was reported
- ☐ Full names of the deceased's parents
- ☐ Details of the deceased's children (including deceased children), including their marital status.
- ☐ Fixed properties:
 - ☐ original title deeds or safe custody receipts
 - ☐ most recent home loan statements
 - ☐ current lease agreements
 - ☐ rates and/or levy statements
 - ☐ details of any credit life cover
 - ☐ capital gains tax valuations
 - ☐ proof of insurance
- ☐ Motor vehicles:
 - ☐ registration certificates
 - ☐ recent statement in respect of any finance
 - ☐ proof of insurance
- ☐ Recent credit card account statements (including the card itself)
- ☐ Recent bank statements and ATM cards for all accounts
- ☐ Original policy documents in respect of any life assurance, endowments and/or annuities
- ☐ Original firearm licenses and details of all ammunition held (if applicable)
- ☐ Details of all funeral expenses
- ☐ All medical accounts
- ☐ Recent retail store account statements
- ☐ Recent loan account statements
- ☐ Credit agreements and recent statements
- ☐ Telkom account
- ☐ Original identity of the surviving spouse
- ☐ Original identity of the Executor
- ☐ Recent utility bill for the Executor
- ☐ Contact details for all beneficiaries
- ☐ Any financial investments other than bank accounts
- ☐ Details of business in respect of which the deceased was a sole proprietor
- ☐ Money owing to the deceased by any person, trust, company or close corporation
- ☐ Assets owned in any country other than South Africa
- ☐ Income tax number
- ☐ Name and contact details of any person who may have prepared the tax returns for the deceased.
- ☐ In addition to the medical account, the medical aid details
- ☐ Pension Fund details
- ☐ If the person was employed, employment details and last payslip