

# DOCUMENTATION FOR THE INITIAL CONSULTATION IN ORDER TO REPORT A DECEASED ESTATE

## FORMAL DOCUMENTATION

- original will and codicils if any\*
- details of the witnesses to the will (if not a will drafted by STBB)
- original death certificate\*
- Notice of Death / Notice of Still Birth form (DHA1663)
- original identity book of deceased\*
- original identity book of spouse of deceased\*
- original marriage certificate\*
- divorce order in respect of each prior marriage terminated by divorce
- antenuptial contract

## FOR EACH EXECUTOR

- original identity book\*
- recent utility bill, eg. rates, electricity, telephone account to comply with Financial Intelligence Act

## FOR EACH BENEFICIARY

- contact details (preferably an email address and a telephone number) for use during business hours

## ASSETS\*

As much information as possible including up to date documentation where applicable regarding whichever of the following types of assets may have been owned by the deceased:

- immovable property
- furniture, household effects
- jewellery
- firearms
- motor vehicles
- banking accounts, eg. savings, cheque, fixed deposit, call, money market. Please provide an up to date statement showing a full month of activity on any savings or cheque account which the deceased used

for everyday transactions, eg. debit orders, payments received from investments and annuities, internet banking, etc.

- other financial investments, eg. unit trusts, property syndications, shares quoted on the stock exchange
- private company shares, member's interest in close corporation
- partnership interests
- business in respect of which the deceased was a sole proprietor
- insurance policies
- annuity policies
- moneys owing to deceased by any person, trust, company, close corporation
- assets owned in any country other than South Africa
- any asset other than the above which may have been owned by the deceased

## LIABILITIES

As much information as possible including up to date statements where applicable on each of the following debts which may have been owing by the deceased at the date of his death

- mortgage bonds
- credit cards
- personal loans
- store accounts, eg. Woolworths, Edgars
- hire purchase agreements and leases
- any other debt not specifically mentioned

## INCOME TAX

- last tax assessment
- e-filing login password where applicable

- name and contact details of any person who may have prepared the tax returns for the deceased

## MEDICAL AID

- name and contact details of medical aid fund
- any medical accounts which must be submitted to medical aid

## PENSION

- name and contact details of pension fund
- pension payment advice

## EMPLOYMENT

- name and contact details of employer
- last payslip

## GENERAL

If there is anything not mentioned above which you consider important, please bring the relevant information to the consultation.

Items marked with an asterisk \* are the most important and every effort should be made to bring these to the first consultation. However, should any such item be unavailable (eg. perhaps the death certificate has not yet been issued), it is not necessary to postpone the consultation. This would merely mean that we would not be able to report the estate to the Master until we have whatever may be outstanding.

For assistance, contact us at  
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