

# STBB



| LIFE FILE



A life file provides a centralised storage facility for one's legal, personal, and financial documentation enabling our loved ones to locate our essential documents after our passing. Ideally, the contents of a life file should be digitally scanned and saved. Use eVault to safely and confidentially store personal documents, including your will, marriage certificate, and title deeds.

Housed in the STBB Direct app, eVault is an easy-to-use document storage and sharing facility that provides our clients with secure access to important documents.

**Scan the QR codes to view our guide on how to submit a document to your eVault.**



How to Submit an Electronically Saved Document



How to Submit a Hard Copy Document

## PREPARING YOUR LEGACY: ESTATE PLANNING ESSENTIALS

Scan the QR codes below to download our online brochures.



Documentation Required to Report a Deceased Estate



Steps in the Estate Administration Process



Estate Expenses Explained

## 1. PERSONAL DETAILS

Name			
Middle Name			
Surname			
Maiden Name / Previous Name			
SA ID Number / Foreigner Date of Birth			
Nationality			
Home Telephone Number			
Work Telephone Number			
Mobile Number			
Email Address (Work)			
Email Address (Private)			
SA Income Tax Number			
SARS eFiling Login Details			
VAT Number, If Applicable			
Will Held By (Individual / Company Name & Contact)			
Nominated Executor(s) In Will & Contact Details			
Living Will Held By (Individual / Company Name & Contact)			
<b>Marital Status (Tick Applicable):</b>	<input type="checkbox"/> Unmarried	<input type="checkbox"/> Divorced Date & Location of Divorce Order:	<input type="checkbox"/> Married In Community of Property Date:
	<input type="checkbox"/> Married Out of Community of Property Date:	<input type="checkbox"/> With Accrual or <input type="checkbox"/> Without Accrual	<input type="checkbox"/> Widow/Widower Name of Pre-Deceased Spouse
	Antenuptial Contract Number:                    H                    /		Estate No:
	<input type="checkbox"/> Married ITO Muslim / Hindu Rites Date:	<input type="checkbox"/> Customary Marriage Date:	<input type="checkbox"/> Foreign Marriage Married According to the Laws of: Country: Date:
	<input type="checkbox"/> Civil Partnership Date:		

**2. SPOUSE / PARTNER DETAILS**

Name	
Middle Name	
Surname	
SA ID Number / Foreigner Date of Birth	
Nationality	
Home Telephone Number	
Work Telephone Number	
Mobile Telephone Number	
Email Address	

**3. CHILDREN'S DETAILS**

<b>Name of Child 1</b>	
ID Number / Date of Birth	
Contact Telephone Number	
Email Address	
Home Address	

<b>Name of Child 2</b>	
ID Number / Date of Birth	
Contact Telephone Number	
Email Address	
Home Address	

<b>Name of Child 3</b>	
ID Number / Date of Birth	
Contact Telephone Number	
Email Address	
Home Address	

<b>Name of Child 4</b>	
ID Number / Date of Birth	
Contact Telephone Number	
Email Address	
Home Address	

**4. EMERGENCY CONTACT PERSONS / NEXT OF KIN**

Name	Relationship	Telephone Number & Email Address

**5. DETAILS OF DOMESTIC WORKER / GARDENER / NANNY**

Name of Staff Member	Contact Number & Email Address

**6. HOME SERVICE PROVIDERS**

Service Provider	Name & Company	Telephone Number & Email Address
Electrician		
Plumber		
Home Alarm Technician		
Handy Man		

**7. SECURITY INFORMATION**

Armed Response Company	
Contact Person(s) & Telephone Number	
Home Alarm Code	
Home Alarm Administrator's Code	
Home Alarm Password	
Safety Deposit Box No. & Location	
Home Safe Code & Location	
Home Safe Key Location	
Home Access Control Codes	
Location of Spare Remote Controls	

## 8. PROFESSIONAL SERVICE PROVIDERS

	Name	Company	Telephone Number & Email Address
Attorney			
Accountant / Bookkeeper			
Financial Advisor			
Insurance Broker			
Doctor			
Medical Aid Broker			
Private Banker			
Dentist			

## 9. EMPLOYMENT INFORMATION

Company Name	
Contact Person(s)	
Contact Telephone Number	
Employee Number	

## 10. MEDICAL INFORMATION

Name of Medical Aid Company	
Plan Option	
Medical Aid Number	
Online Username	
Online Password	
Blood Group	
Organ Donor (Y/N)	
Gap Cover Policy Number	

## 11. PET INFORMATION

Pet Species & Breed	
Pet Name(s)	
Vet Name	
Vet Contact Telephone Number	
Pet Insurance Details	

**12. MOBILE PHONE INFORMATION**

<b>Phone Number 1</b>	
Pin Number	
Phone IMEI (15-Digit Number)	
PUK	
Mobile Phone Contract Holder	

<b>Phone Number 2</b>	
Pin Number	
Phone IMEI (15-Digit Number)	
PUK	
Mobile Phone Contract Holder	

**13. DIGITAL INFORMATION**

Platform	Username	Password
Laptop		
Tablet / Ipad		
Facebook		
Twitter (X)		
Instagram		
Pinterest		
Cloud Services		
Other		

**14. LIST OF ACCOUNTS AND SUBSCRIPTIONS**

Detail	Company Name	Account / Ref #
Internet Service Provider		
Fibre Service Provider		
DSTV		
TV Licence Number		
Netflix		
Showmax / Other		
Landline Telephone Number (E.g. Telkom)		

**14. LIST OF ACCOUNTS AND SUBSCRIPTIONS (CONTINUED)**

Detail	Company Name	Account / Ref No.
Retailer Account (E.g. Woolworths)		
Subscriptions / Debit Orders		
Subscriptions / Debit Orders		
Other		

**15. FINANCIAL INFORMATION**

Details	Company & Contract Name	Telephone Number & Email Address	Policy / Ref No.
Life Cover			
Funeral Cover			
Household Insurance			
Personal Loan			
Pension Fund			
Provident Fund			
Annuity			
Discretionary Investments			
Offshore Investments			
Shares			
Other			

**16. IMMOVABLE PROPERTIES**

Address	Erf No.	Home Loan Bank & Account No / Title Deed Held By



**17. BANK ACCOUNT INFORMATION**

<b>Name of Bank</b>	
Account Holder Name	
Account Type	
Account Number	
Online Details	
Username	
Password	

<b>Name of Bank</b>	
Account Holder Name	
Account Type	
Account Number	
Online Details	
Username	
Password	

<b>Name of Bank</b>	
Account Holder Name	
Account Type	
Account Number	
Online Details	
Username	
Password	

<b>Name of Bank</b>	
Account Holder Name	
Account Type	
Account Number	
Online Details	
Username	
Password	

## 18. MOTOR VEHICLE(S)

<b>Motor Vehicle 1</b>	
Description	
Make & Model	
Registration Number	
VIN Number	
Location of Vehicle	
Vehicle Licence Expiry Date	
Registration Papers Held By	
Service Book Location	
<b>Vehicle Financed By</b>	
Company	
Contact Number	
Reference Number	
<b>Vehicle Insurance</b>	
Company	
Contact Number	
Reference Number	

<b>Motor Vehicle 2</b>	
Description	
Make & Model	
Registration Number	
VIN Number	
Location of Vehicle	
Vehicle Licence Expiry Date	
Registration Papers Held By	
Service Book Location	
<b>Vehicle Financed By</b>	
Company	
Contact Number	
Reference Number	
<b>Vehicle Insurance</b>	
Company	
Contact Number	
Reference Number	

Car Keys and Spares Held At	
Garage Remotes Held At	

**19. FIREARMS:**

Make and Serial Number	
Licence Safekeeping Address	
Ammunition Safekeeping Address & Contact Name	

**20. OTHER MOVABLE ASSETS, VALUABLES, COLLECTIONS, JEWELLERY, ETC.**

Description	Safekeeping* Address & Contact Info

**21. INTEREST IN COMPANIES / CLOSE CORPORATIONS / TRUSTS**

<b>Name &amp; Registration No. of Legal Entity 1</b>	
Contact Person Name and Details	
Type of Interest (Director, Member, Trustee, Shareholder, Beneficiary)	
<b>Name &amp; Registration No. of Legal Entity 2</b>	
Contact Person Name and Details	
Type of Interest (Director, Member, Trustee, Shareholder, Beneficiary)	

Due to the sensitive nature of this information:

- Allow STBB to hold your original Will and Title Deeds
- Remember to advise your next-of-kin where your original documents are held in safekeeping e.g. Will, Marriage Certificate, Birth Certificate, ID, Title Deeds, Trust Deeds, Letters of Authority, Company / CC Registration Documents, etc.

**For assistance, contact us at**

**E:** estates@stbb.co.za

**T:** 021 673 4700