

PERSONAL DETAILS

Surname	
Known as	
Initials	
ID Number	
Nationality	
Gender	
Tel	
Cel	
Marital Status	

First Names	
Title	
Maiden Name	
Date of Birth	
Passport Number	
Language	
Fax	
e-mail	
Date of Marriage	
Date of Death	

ADDRESS DETAILS - Mark preference for correspondence

Physical	
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Postal	
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SPOUSE

Surname	
Known as	
Initials	
ID Number	
Nationality	
Gender	
Tel	
Cel	

First Names	
Title	
Maiden Name	
Date of Birth	
Passport Number	
Language	
Fax	
e-mail	

NEXT OF KIN FOR IMMEDIATE CONTACT

Surname	
First Names	
Known as	
Title	
Initials	
Relationship to self	
Contact info:	

Surname	
First Names	
Known as	
Title	
Initials	
Relationship to self	
Contact info:	

BENEFICIARY INFORMATION

Surname	
First Names	
Known as	
Title	
Initials	
Maiden Name	
ID Number	
Date of Birth	
Relationship to self	
Contact info:	

Surname	
First Names	
Known as	
Title	
Initials	
Maiden Name	
ID Number	
Date of Birth	
Relationship to self	
Contact info:	

Surname	
First Names	
Known as	
Title	
Initials	
Maiden Name	
ID Number	
Date of Birth	
Relationship to self	
Contact info:	

Surname	
First Names	
Known as	
Title	
Initials	
Maiden Name	
ID Number	
Date of Birth	
Relationship to self	
Contact info:	

BANK & INCOME DETAILS

Account Holder	
Account Number	
Type of Account	

Bank	
Branch	

INCOME DETAILS

Rental Income	
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Property	

Pension:	
Investments	

Account number

No	

INCOME TAX INFORMATION

SARS Ref No	
Consultants Name	
Contact number	
Email address	

SARS Office	
Company Name	
Contact number	
Fax number	

MEDICAL AID DETAILS

Name of Med Aid	
Medical Plan	
Contact Name	
DOCTORS NAME	

Med Aid Number	
References	
Contact Number	
Contact number	

SHORT TERM INSURANCE DETAILS

Fixed property	
Household Effects	
Vehicles	
Other	

Insurance Number	Contact details

FIXED PROPERTY

Title Deeds	Address	Balance Bond	Bond Account Number
Municipal acc		Erf	

Municipal acc		Erf	

BUSINESS/CLUB INTERESTS OR ASSOCIATION

Name of Business

Reference numbers

Contact Details

ESTATE DETAILS

Date of Will	
Executors	
Address	
Cremation/Burial	
Living will in place	

Location of Will	
Contact Name	
Contact Number	
Organ Donation	Yes/No
Which Organs	

DOCUMENTATION

- Birth Certificate
- Marriage Certificate
- ANC Contract
- Title deeds
- Vehicle Reg
- Rental Agreements
- Life Insurance Policies
- Annuity contracts
- Share Certificates
- ID Docs
- Power of Attorney
- Tax File

OTHER

- Telephone Acc
- TV Licence