

DECEASED ESTATE ADMINISTRATION DOCUMENT CHECKLIST:

*Make sure you have the
following documents available:*

- ☐ 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
- ☐ Deceased tax number

Contact us at

☎ 011 748 4500 or ✉ info@janljordaan.co.za or leave your details and we will call you back

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