

WILL APPLICATION FORM

[1] TYPE OF WILL & LANGUAGE DRAFTED (Select which applicable)

<input type="checkbox"/>	SINGLE WILL	<input type="checkbox"/>	DRAFT IN AFRIKAANS?
<input type="checkbox"/>	JOINT WILL	<input type="checkbox"/>	DRAFT IN ENGLISH?
<input type="checkbox"/>	NEW APPLICATION FOR A WILL?	<input type="checkbox"/>	REVIEW OF CURRENT WILL?

[2] DETAILS: TESTATOR

INITIALS AND SURNAME	
FULL NAMES	
ID NUMBER	
OCCUPATION	
MOBILE NUMBER	
CONTACT NUMBER	
E-MAIL	
PHYSICAL ADDRESS	

[3] DETAILS: TESTATRIX

INITIALS AND SURNAME	
FULL NAMES	
ID NUMBER	
OCCUPATION	
MOBILE NUMBER	
CONTACT NUMBER	
E-MAIL	
PHYSICAL ADDRESS	

[4] MARRIAGE STATUS

	NOT MARRIED		MARRIED
	DIVORCED		IN COMMUNITY OF PROPERTY
	WIDOW / WIDOWER		OUT OF COMMUNITY WITH ACCRUAL
			OUT OF COMMUNITY WITHOUT ACCRUAL
			LIVING TOGETHER
			CUSTOMARY
			OTHER

Please attach a copy of the divorce order/ ** Please attach a copy of your marriage certificate and antenuptial contract or cohabitation agreement.

[5] CHILDREN (Includes adopted children)**[5.1] CHILDREN BORN FROM THE MARRIAGE BETWEEN THE TESTATOR & TESTATRIX**

	Names and Surname	Date of Birth	<u>M</u>	<u>F</u>
(a)				
(b)				
(c)				
(d)				
(e)				
(f)				

[5.2] CHILDREN BORN FROM PREVIOUS MARRIAGE / RELATIONSHIP OF TESTATOR

	Names and Surname	Date of Birth	<u>M</u>	<u>F</u>
(a)				
(b)				
(c)				
(d)				
(e)				
(f)				

[6.4] INHERITANCE OF ASSETS – FAMILY OBLITERATION

Special Bequests?	
Remainder of Estate?	

[7] EXECUTOR(S)

[7.1]	TRUSTWISE EXECUTORS (PTY) LTD	
[7.2]	ANY OTHER PERSON?	
	NAME AND SURNAME:	
	ID NUMBER:	
	ON BEHALF OF WHOM:	
	RELATION:	

[8] MINOR CHILDREN

In the case of minor child(ren) left behind, who is designated as guardian(s)?

NAAM AND SURNAME:	
ID NUMBER:	
RELATION:	
ADDRESS:	

NAME AND SURNAME:	
ID NUMBER:	
RELATION:	
ADDRESS:	

[9]	TRUST
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[9.1]	IS A TRUST REQUIRED (Y/N)?	
[9.2]	UNTILL WHAT AGE WILL THE TRUST EXIST (<input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> OTHER?)	
[9.3]	TRUSTWISE EXECUTORS (PTY) LTD APPOINTED AS ADMINISTRATIVE TRUSTEE Y/N?	
[9.4]	OTHER TRUSTEES?	
[9.4.1]	NAME & SURNAME:	
	ID NUMBER:	
	RELATION:	
	OCCUPATION:	
[9.4.2]	NAME & SURNAME:	
	ID NUMBER:	
	RELATION:	
	OCCUPATION:	

[10]	SPECIFIC INSTRUCTIONS
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Do you want to be cremated/buried?	Cremated	
	Buried	

Do you want a living will, YES/NO? (I do not want to be kept alive artificially)		
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Are you / your life partner illiterate or visually impaired, Y/N?		
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To whom may access to digital assets be granted?	

[11] ADDITIONAL REMARKS

[12] DETAILS: FINANCIAL PLANNER / BROKER

INITIALS AND SURNAME	
FULL NAMES	
COMPANY	
CONTACT DETAILS	
E-MAIL	
PHYSICAL ADDRESS	

[13] DETAILS: PERSON THAT COMPLETES FORM

NAME AND SURNAME	
ID NUMBER	
RELATION	
ADDRESS	
TEL NO	
MOBILE NO	
E-MAIL ADRES	
SIGNATURE	

[14] DECLARATION BY CLIENT

[14.1]	I confirm that TRUSTWISE EXECUTORS may communicate with my financial planner and provide him/her with a copy of my will in accordance with the details set out in section [12].
[14.2]	I confirm that TRUSTWISE EXECUTORS may communicate with me electronically, and I confirm that I may be contacted via email at the provided address.
[14.3]	Keep me informed about your products and services: Y/N

CLIENT SIGNATURE	DATE

[15]**FURTHER INFORMATION REGARDING THIS FORM**

The costs associated with the drafting of a will amount to R450-00 plus VAT.

[15.1]	Please return the completed form to: info@trustwiseexecutors.co.za , in order to enable us to open a file on our system.
[15.2]	Once we have opened a file, we will provide you with the relevant reference number and invoice (R450.00 plus VAT).
[15.3]	Upon receipt of proof of payment, we will draft your will.
[15.4]	You can then sign the will in duplicate and provide us with one original copy of the will.
[15.5]	We will keep the other original will on file and in storage. Please feel free to contact us if you need any further advice or guidance.
[15.6]	Please complete the addendum below and provide it to us along with this form.

[16]**ASSETS**

If the Net Worth of your estate exceeds the amount of R 3.5 million, consider making an appointment with your financial advisor for an estate planning consultation and provide the requested information.

If you are married in community of property, only complete the testator's portion, except for insurance.

		Testator R	Testatrix R
[16.1]	FARM ASSETS		
	Livestock		
	Implements/farming tools		
	Farming vehicles		
	Crop Yield on Lands		
	TOTAL [16.1]		

[16.2]	IMMOVEABLE PROPERTY		
	Residential		
	(a)		
	(b)		
	(c)		
	Commercial		
	(a)		
	(b)		
	(c)		
	Other		
	(a)		
	(b)		
	(c)		
	Mineral Rights		
	TOTAL [16.2]		

[16.3]	Moveable Assets		
	Vehicles		
	(a)		
	(b)		
	(c)		
	Firearms		
	(a)		
	(b)		
	(c)		
	(d)		
	Furniture and Household		
	Other		
	(a)		
	(b)		
	(c)		
	TOTAL [16.3]		

[16.4]	LIQUID ASSETS		
	Share Portfolio		
	Unit Trusts		
	Bonds / Loans		
	Cash Investments		
	Other		
	(a)		
	(b)		
	(c)		

	TOTAL [16.4]		
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[16.5]	BUSINESS INTERESTS		
	Shares in Private Companies		
	Loan Accounts		
	Sole proprietor		
	Other Loan Accounts		
	TOTAL [16.5]		

[16.6]	PURCHASE -AND SALE AGREEMENTS		
	Loan Accounts		
	Interest in CC		
	Loan Accounts		
	Interests in Partnerships		
	Sole Proprietor		
	Other Loan Accounts		
	TOTAL [16.6]		

[16.7]	INTERVIVO'S TRUST		
	Loan Account		
	TOTAL [16.7]		

[16.8]	FOREIGN ASSETS		
	(a)		
	(b)		
	(c)		
	(d)		
			<input type="checkbox"/>
	TOTAL [16.8]		

	TOTAL [16.1] TO [16.8]		
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[17]	LIABILITIES		
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[17.1]	Vehicle finance		
[17.2]	Mortgage Bonds		
[17.3]	Overdraft(s)		
[17.4]	Loan(s)		
[17.5]	Credit Card(s)		
[17.6]	Income Tax		
[17.7]	Guarantee / Security		
[17.8]	Possible Maintenance Claim		
[17.9]	Other		
	(a)		
	(b)		
	(c)		
	(d)		
	TOTAL: LIABILITIES		