

# Documents to be kept together to make is easier for a executor

## PERSONAL

- 1. The Will document**
- 2. Death certificate**
- 3. Identity document**
- 4. Antenuptial contract**
- 5. Minors:**
  - Birth certificates
  - Identity numbers
- 6. Heirs and legatees**
  - Addresses
  - Identity numbers
  - Marriage certificates
  - Birth certificates (if a minor) - Agreements
- 7. Divorced spouse:**
  - Name
  - Address
  - Final divorce order
- 8. Predeceased spouse:**
  - Name
  - Date of death
  - Place of death
  - Copy of Will (if available)

## GENERAL

- 1. Insurance policies covering assets**
- 2. Income tax:**
  - Revenue office
  - Reference number
- 3. Medical aid:**
  - Fund name
  - Membership number

## ASSETS

- 1. Investments**
  - Type
  - Institution
  - Account number
  - Certificate/receipts
- 2. Fixed property:**
  - Title deed description
  - Title deed (if available)
- 3. Movable property:**
  - Description
- 4. Life assurance:**
  - Company
  - Policy
- 5. Salary/pension:**
  - Employer/fund
  - Reference number
- 6. Debtors:**
  - Names and addresses
  - Agreements
- 7. Business interests:**
  - Type
  - Agreements

## LIABILITIES

- 1. Creditors:**
  - Name
  - Address
  - Reference number
  - Balance sheets
- 2. Funeral:**
  - Undertaker
  - Address
  - Reference number