**Will Application Form**

**Complete and send the form to us at** [**info@willandtestament.co.za**](mailto:info@willandtestament.co.za)

**www.willandtestament.co.za**

**Procedure after we receive the form**

**The appropriate companies document will be completed.**

**If information is needed you will be contacted for it.**

**If a signature is needed it will be sent to you for signing, and to send it back to us**

**After we receive it back from the company, it will be sent to you for corrections if necessary.**

**When it is corrected you will sign 2-3 copies. One for you, one for us, and one for the drafting company.**

**Document that must accompany the application:**

**Life insurance and investment summary:** You need to make provision for estate and liability costs for us to be able to draft and handle your will and estate. We therefore need to have a look at how you provide for it and provisions you make in the will.

If you do not have such a summary, download our authorization form and we will find it for you at

<http://www.financialadviceonline.co.za/downloads/Authorization.pdf>

**Personal Information**

**Language for your will.**

* Afrikaans
* English

**How many people will be on the will?**

* Single / One
* Joint / Two – Principle and Spouse

**Current Marital Status**

* Single
* Married in Community of Property
* Married out of Community of property (With Accrual)
* Married out of community of property (Without Accrual)
* Married according to the laws of another Country
* Married according to customer Law
* Married according to Islamic Rites
* Married according to Hindu Rites
* Divorced

|  |  |  |
| --- | --- | --- |
|  | **First Persons Detail** | **Second Persons Detail** |
| **Title** |  |  |
| **Full Names** |  |  |
| **Surname** |  |  |
| **Maiden Surname** |  |  |
| **Id Number** |  |  |
| **Do you want to be Cremated** |  |  |
| **Do you want to donate your organs to other people** |  |  |
| **Do you want a normal Burial** |  |  |
| **Email Address** |  |  |
| **Contact Number** |  |  |

|  |  |
| --- | --- |
| **Postal Address** | **Home / Physical Address** |
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**If Divorced, do you have any divorce Obligations, Give details**

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| --- | --- | --- | --- | --- | --- |
|  | | **To who**  **And Percentage** | | **Id number if not mentioned before** | |
| **Principle** | |  | |  | |
| **Spouse** | |  | |  | |
| **Child Number** | **Child Full Names and Surname** | | **Male / Female** | | **Id Number** |
| 1 |  | |  | |  |
| 2 |  | |  | |  |
| 3 |  | |  | |  |
| 4 |  | |  | |  |

**Assets**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Asset** | **Description and or Address** | **Who is the owner:**  **Principle or Spouse** | **Value** | **Liability on Asset** |
| **Residential Property** |  |  |  |  |
| **Residential Property** |  |  |  |  |
| **Other Property** |  |  |  |  |
| **Agricultural Property** |  |  |  |  |
| **Equipment, Machinery** |  |  |  |  |
| **Vehicles** |  |  |  |  |
| **Livestock** |  |  |  |  |
| **Shares,Stocks,Bonds** |  |  |  |  |
| **Cash, Money Market** |  |  |  |  |
| **Unit Trusts** |  |  |  |  |
| **Partnership agreements** |  |  |  |  |
| **Sole Proprietorships** |  |  |  |  |
| **Private Company** |  |  |  |  |
| **Loan Account Held in Private Comp** |  |  |  |  |
| **Close Corporations** |  |  |  |  |
| **Loans Accounts in Trusts** |  |  |  |  |
| **Foreign Assets** |  |  |  |  |
| **Other** |  |  |  |  |

**Guardians for children under 18**

|  |  |  |
| --- | --- | --- |
| **Name and Surname** | **Contact Details** | **Relatioship** |
|  |  |  |
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Provision will be made for the creation of a testamentary trust for the protection of a minor beneficiary in your estate/s. Please indicate at what age of the beneficiary the testamentary trust should terminate and the assets distributed to him or her? Should you not stipulate any age in the application form, the testamentary trust will terminate when the beneficiary reaches the age of majority, which is currently 18 years.

Or other age (s) \_\_\_\_\_\_\_\_\_\_\_\_

**Drafting of the will.**

**Do you have special bequests / Is there any item or items that must go to someone specifically?**

(This can include money splits, property splits etc)

|  |  |  |
| --- | --- | --- |
| **Items Principle** | **Name and Surname of Heir** | **Id number** |
|  |  |  |
|  |  |  |
|  |  |  |
| **Items Spouse** |  |  |
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|  |  |  |

**If above assets were bequest, to who goes the rest of your estate.(Restant)**

|  |  |  |
| --- | --- | --- |
|  | **To who**  **And Percentage** | **Id number if not mentioned before** |
| **Principle** |  |  |
| **Spouse** |  |  |

**If the restant goes to the spouse but the spouse dies with the principle simultaneously and the restant goes to the children, and the children dies with the parents to who goes the restant.**

|  |  |  |
| --- | --- | --- |
|  | **To who**  **And Percentage** | **Id number if not mentioned before** |
| **Principle** |  |  |
| **Spouse** |  |  |

**Where do you want the will to be drafted?**

(See costs on www.willandtestament.co.za)

* Liberty Trust
* Sanlam
* Momentum
* PSK Consult

**Bank Account Details to Collect fees**

|  |  |
| --- | --- |
| Account Holder Name |  |
| Bank |  |
| Branch or branch Code |  |
| Account Number |  |