CAPITAL LEGACY™

leave a legacy

HOW WE DO

BUSINESS

GET YOUR LAST WILL & TESTAMENT AND PROVIDE FOR FEES:

At Capital Legacy, we are dedicated to making the drafting of your Last Will & Testament an easy step-by-step process. Simply follow these steps:

1. Consult with one of our Capital Legacy accredited Financial Advisors regarding what you require for your Last Will & Testament. You could also be referred by your Capital Legacy advisor to meet with a Capital Legacy consultant.
2. Your Capital Legacy Advisor will assist you in using our specifically-designed calculator during your consultation, to determine the legal fees applicable in terms of your Last Will & Testament.
3. Using the same calculator, your Capital Legacy Advisor will assist you to review our product options in order to provide for some or all of the abovementioned fees.
4. Once you are comfortable with your fee structure and that all requirements have been met, select the product option that is most appropriate for you.
5. Complete the necessary application forms.
6. Receive your final draft Last Will & Testament and member or policy schedule via email from us.
7. Sign your Last Will & Testament using our guidelines.
8. Send a scanned copy of your signed Last Will & Testament by email to us at wills@capitallegacy.co.za
9. Place your signed, ORIGINAL Last Will & Testament in a safe place.
10. Follow our suggestions on other safe-keeping options to use.

SAFE-KEEPING OF YOUR LAST WILL & TESTAMENT:

It is essential to keep a copy of your signed, original Last Will & Testament in a safe place with you. We also recommend that you follow one or all of these suggestions for the additional safe-keeping of your Last Will and Testament:

1. Place your signed and **ORIGINAL** Will in a safe place. At least one friend or family member should know its whereabouts and how to access it.
2. Ensure that we too have a copy of your signed, correct Will. Please scan and send a **COPY** of the signed Will to wills@capitallegacy.co.za. Please make sure that you provide us with as many contact details for you as possible.
3. For extra peace of mind, we can keep a **SECOND, SIGNED** and **ORIGINAL** Will for you in our safe custody at no extra cost
4. Please use one of the following options: Post, courier or deliver. Please refer to the Signing Guidelines for Wills for further details.

CLAIMING THE BENEFITS FROM CAPITAL LEGACY:

When the time comes to claim the benefits of a family member or loved one's Last Will & Testament, we recommend following these easy, simple steps:

1. Contact the necessary Capital Legacy Financial Advisor or notify us of the claim via claims@capitallegacy.co.za.
2. We will contact you and provide you with the relevant forms for completion and signature (note that in the event of death, we will automatically commence the estate administration process).
3. Complete and sign abovementioned forms with any necessary supporting documents required and send these back to us.
4. We will assess and process your claim and keep you informed during the process.
5. If approved, the timeous administration of your estate and the execution of payment of benefits and services will follow.