

REQUEST FOR A DRAFT LAST WILL AND TESTAMENT



SECTION A Client details:

Title & Full names

Smoking Status Smoking Non-smoking Highest education

Identity number Employment Permanent Non-permanent

Will language English Afrikaans Monthly income R

Marital status & type Intermediary

Contact number Email address

SECTION B Estate values (i.e. to estimate the Executor & Trustee fees):

Property(ies)	R <input type="text"/> .00	Business interests	R <input type="text"/> .00
Life cover (to estate)	R <input type="text"/> .00	Cash	R <input type="text"/> .00
Shares	R <input type="text"/> .00	Other	R <input type="text"/> .00
Investments	R <input type="text"/> .00	Gross liabilities	R <input type="text"/> .00

Is a Legacy Protection Plan™ required to protect your beneficiaries against Executor, Trustee and Conveyance fees?

SECTION C Will type & percentage inheritance of the general or residue estate

& % Estate to spouse, failing spouse to: Children None Other

& % Estate to child or children

& % Estate to other natural person(s) or a legal entity (i.e. Parents or Inter Vivos Trust)

SECTION D Special bequest(s)

Cash Amount R .00 to: Spouse Child Other

Life cover(s) Payable: in terms of my Will to Estate to: Spouse Child Other

Other Specify: to: Spouse Child Other

SECTION E Last wishes:

Burial wish: Cremated Buried Organ donor Living Will Last wish(es): Yes No

If you have any other wishes or special notes, please specify below in the space provided.

"Its my last wish that

SECTION F Beneficiary nominations (only complete where applicable & specify relationships where needed):

Type	Names	Date of birth / Reg No
Spouse		
Child		
Child		
Other		
Other		

SECTION G Appointments (only complete where applicable):

Guardian(s) required Yes No Alternate guardian(s) Yes No

Testamentary Trust(s) Yes No Termination age of trust years of age

Professional Trustee Capital Legacy Yes No Other Trustee(s) Yes No

Professional Executor Capital Legacy Yes No Other Executor(s) Yes No

Type	Names	Date of birth / Reg No
Guardian		
Guardian		
Other Trustee		
Other Trustee		
Other Executor		

SECTION H Other notes:
