



VAN HEERDEN ATTORNEYS
estate administrators

A GUIDE FOR THE BEREAVED



INTRODUCTION: Like any story, life has a beginning and an end. The loss of a loved one is an emotional and traumatic time. During such a time professional help is needed to take care of the administration relating to the winding up of the estate.

WHAT TO REMEMBER

- If someone dies in a hospital or at home, a doctor will issue a medical certificate, for which the identity document is required.
- The local police should be informed if the cause of death was unnatural.
- Inform next of kin and friends.
- Inform the undertakers and start with funeral arrangements.
- Contact your financial advisor/executor/estate administrator to report the estate, once the funeral/memorial service has taken place and you receive the original death certificate.

IMPORTANT DOCUMENTS

- All original Wills of the deceased, if any
- Original Death Certificate
- Original ID of the deceased
- Notification of death
- Latest Pension fund Statement
- Latest medical aid statements
- Latest assessment from SARS or Tax number
- Name and phone number of the auditor/bookkeeper
- Original ID of Executor and proof of address (FICA)
- Fixed property / bond account details municipal account
- Firearm licence
- Share certificates/statements
- Statement of all bank accounts
- Policy contracts numbers of all policies and annuities
- Receipt and invoice for funeral services
- Short-term insurance details
- Any claims against the estate (Doctors accounts etc...)
- Telkom account; cell phone details; PO Box; TV licence etc.
- Only if applicable: Anti-nuptial contract; marriage certificate; divorce order; details of predeceased spouses names; Masters Office and Estate Number
- Proof of bank details of beneficiaries (Bank Statement)
- Contact details of the beneficiaries (Postal address, Street address; e-mail; phone numbers; SARS reference numbers)
- Copies of IDs and ANC of beneficiaries

Cumulatively we have more than 50 years' experience in deceased estates administration. Our team are dedicated, mature and handle every step of the process attentively and tenaciously. Delivering a personal experience to the family/nominated executor.

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