VAN HEERDEN ATTORNEYS
estate administrators

A LIST OF REQUIREMENTS

A LIST OF DOCUMENTS

So often during times of grief, the last thing we need to try and cope with is administration. We have compiled a comprehensive list of documents that you will need to bring along to our first meeting.

- Original Death Certificate
- Original Identity Document of the deceased
- ID of spouse or Predeceased spouses Death Certificate
- Marriage certificate
- Copy of ID's of the beneficiaries
- ID of the executor
- Proof of residence of the executor not older than 1 month (FICA)
- Notification of Death BI-1663
- All original Wills available
- Proof of Bank details of beneficiaries (Bank statement) and contact details
- Latest Pension fund statement
- Latest Medical Aid statement
- Latest assessment from SARS
- Name and phone number of Auditor/Book keeper
- Contact details of the beneficiaries (Postal address, Street address, e-mail, phone numbers, SARS reference numbers)
- Certified copies of ID's, and marital status
- Fixed property: bond account details, Municipality statement, deed of transfer
- Details on timeshare, etc...
- Registration certificate for motor vehicle(s)
- Firearms licences and details
- Share certificates/statements
- Statements of all bank accounts & investments
- Policy information, numbers of all policies and annuities
- Receipt or invoice for funeral services
- Short term insurance details
- Any claims against the estate (Doctors accounts etc...)
- Telkom, cell phone details, Post Box, TV Licence, DSTV
- Only if applicable: Ante nuptial contract, Marriage certificate, Divorce order, Details of pre-deceasedspouse: Names, master's Office and Estate Number, death certificate of predeceased spouse

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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