

Documents required by an Executor

The Estate must be reported to the nominated Executor with the relevant documents.

This checklist should assist you to collate the relevant documents for a fast and efficient settlement of the estate.

- Last signed will
- Identity Document (deceased and spouse)
- Death Certificate
- Marriage certificate
- Marriage or Antenuptial Contract
- Details regarding pre-deceased spouses
- Divorce documents
- Copies of Id's of all beneficiaries, provide names, addresses and contact details
- Birth Certificates of minors
- Name and Address of Employer, provide salary slip and employee number
- Pension Fund Details
- Medical Aid Details
- Income Tax Details
- VAT registration numbers
- Title /Sectional Title Deeds/ Certificates of Mineral Rights
- Hire Purchase or leasing contracts
- Firearm Licence
- Motor vehicles Ownership/ Registration Papers
- Banking Details (NOTE: All bank accounts are frozen on the event of death)
- Details of Safety Deposit Boxes
- Saving books/ cards
- Current Cheque book
- Credit cards and other bank cards
- Fixed Deposit bonds
- Details of bondholders.
- Details of Off-Shore Accounts provide Acc. number and address of bank
- Share Certificates
- Investment Certificates
- Unit Trust Certificates
- Life Assurance Policies / Retirement Annuities
- Short Term Policies
- Partnership Agreements, Buy and Sell Agreements
- Financial statement of business
- Details of surety obligations
- Accounts payable by deceased
- TV Licence
- Telephone Accounts
- Municipal Accounts
- If deceased died of unnatural causes, details of accident, Police Station, Name of investigating officer, Mortuary Number
- Receipt of Funeral