


D N K A



ESTATE PLANNER



It's important to keep all your information together. From bank account details to app passwords, your information should be carefully recorded and kept safe.

An estate planning file helps you do this. It's a valuable resource for your loved ones in the event of your death.

THE PURPOSE OF THIS ESTATE PLANNER



Wrapping up your estate after you pass away is made easier for your family by keeping your information in one secure file

MANAGING YOUR ESTATE PLANNER

Update your planner every 6 to 12 months.

Keep physical copies in a safe place to avoid potential identity theft and use a password on your digital copies

WINDING UP YOUR ESTATE

A will and this estate planning file eliminates uncertainty and assists your executor with the process of winding up your estate effectively

WILL

Prepare a will that meets all legal requirements

LIVING WILL

Should you be in a vegetative state or mentally incapacitated, it is a useful guide for your medical practitioners/ family to inform them about what kind of treatment or medical intervention/s you prefer

MENTAL INCAPACITY

Plan for the possibility that you may suddenly become mentally incapacitated and may then no longer be able to make rational decisions

PERSONAL INFORMATION

FIRST NAME				SURNAME				
MIDDLE NAME				ID NUMBER				
MAIDEN NAME <i>(if any)</i>				PASSPORT NUMBER				
NICKNAME <i>(if any)</i>				TAX NUMBER				
HOME NUMBER				WORK NUMBER				
MOBILE NUMBER								
EMAIL								
WILL								
MARITAL STATUS	<input type="checkbox"/>	Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Divorced	<input type="checkbox"/>	Civil partnership
MARITAL REGIME	<input type="checkbox"/>	Community of property						
	<input type="checkbox"/>	Antenuptial contract with accrual						
	<input type="checkbox"/>	Antenuptial contract without accrual						

SPOUSE OR PARTNER DETAILS

FIRST NAME				NICKNAME			
MIDDLE NAME				SURNAME			
MAIDEN NAME				PASSPORT NUMBER			
WORK NUMBER				MOBILE NUMBER			

CHILDREN, MINOR OR OTHER DEPENDANTS

FIRST NAME AND SURNAME	DATE OF BIRTH	ID NUMBER	CONTACT DETAILS

HOME SECURITY

ARMED RESPONSE COMPANY

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HOME ALARM CODE

--

SAFETY DEPOSIT BOX NO.

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SPARE KEYS
(where kept)

--

CONTACT NUMBER

--

HOME ALARM PASSWORD

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HOME SAFE CODE

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FIREARM
(where kept and licence numbers)

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IMPORTANT CONTACT INFORMATION

RELATIONSHIP

NAME

CONTACT

Financial adviser

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Stockbroker

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Lawyer

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Executor

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Psychologist/Psychiatrist

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Private banker

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Medical aid broker

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HR manager

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GP *(family doctor)*

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Healthcare specialist

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Accountant/Bookkeeper

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Executor *(to administer the estate)*

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Preferred funeral director/parlour

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Other 1

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Other 2

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Other 3

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Other 4

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Other 5

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MEDICAL INFORMATION

MEDICAL AID PROVIDER

PLAN NAME

MEDICAL AID NUMBER

BLOOD GROUP

GAP COVER PROVIDER & POLICY NUMBER

ORGAN DONOR

Yes

No

BONE MARROW DONOR

Yes

No

LIVING WILL

Yes

No

BANKING INFORMATION

ACCOUNT
HOLDER NAME

NAME OF
BANK

ACCOUNT
NUMER

ACCOUNT
TYPE

BANKING APP
USER NAME

BANKING APP
PIN/PASSWORD

INSURANCE

LIFE COVER COMPANY

POLICY NUMBER

POLICY NUMBER

POLICY NUMBER

SHORT-TERM INSURANCE COMPANY

POLICY NUMBER

POLICY NUMBER

VEHICLE INSURANCE COMPANY

POLICY NUMBER

FUNERAL COVER COMPANY

POLICY NUMBER

POLICY NUMBER

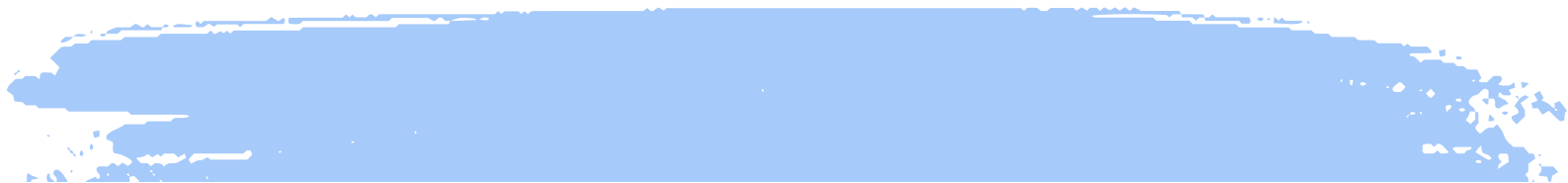
DIGITAL LIFE

DIGITAL EXECUTOR

NAME	CONTACT DETAILS

DIGITAL & SOCIAL MEDIA INFORMATION

PLATFORM	USERNAME	PASSWORD OR PIN
Work email		
Home email		
Other email		
Laptop		
PC		
Tablet		
Mobile		
Facebook		
Twitter		
Instagram		
LinkedIn		
Pinterest		
Share trading accounts		
Medical aid sign-in		
Dropbox		
OneDrive		
Google account		
Microsoft account		
Apple account		
Other		



DOCUMENT CHECKLIST

PERSONAL

ITEM	WHERE
ID (<i>certified copy</i>)	
Marriage certificate (<i>original</i>)	
Divorce & maintenance agreement	
Partner #1's latest will & codicils	
Living will	
Passports (<i>certified copies</i>)	
Vehicle registration/s	
Birth certificate (<i>original</i>)	
Antenuptial/Postnuptial contract	
Firearm licence/s	
Partner #2's latest will & codicils	
Divorce order/separation agreement	
Organ donation record	
Medical reports	

INSURANCE

ITEM	WHERE
Life assurance policies	
Short-term insurance policies	

INVESTMENTS & ASSETS

ITEM	WHERE
Savings account books	
Credit card	
Safe deposit box & key	
Bank account	
statements	

	INVESTMENTS & ASSETS
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ITEM

WHERE

- Listed shares
- Title deeds
- Trust documents
- Coin collection
- Jewellery evaluation certificates
- Unit trust certificates
- Fixed deposit certificates
- Mortgage bond deed/s
- Lease agreements
- Loan agreements
- Other collections
- Cryptocurrency
- Participant bond certificates
- Time-share certificates

	TAX
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ITEM

WHERE

- Financial records
- Balance sheets
- Income tax returns
- Profit and loss accounts

	BUSINESS
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ITEM

WHERE

- Business agreements
- Employee benefit plan certificate
- Group life cover
- Employment contracts
- Pension, profit sharing and retirement plans

