



Consult
Estate Guidance Services

List of documents and information required for reporting an estate

Where applicable, the following documents and information must please be supplied to us when you report an estate. This ensure full and complete reporting and guaranteed success. If not available, I will discuss alternatives with you

Documents / Information	Attached	N. A.
Original will		
Copy of the death certificate		
Copy of the identity document of the deceased		
Copy of the ID of the surviving spouse		
Certified copy of the deceased marriage certificate <i>(If married)</i>		
Certified copy of the deceased ante-nuptial contract <i>(If married out of community of property)</i>		
Copy of divorce order and settlement agreement <i>(If deceased was divorced)</i>		
Postal address, telephone numbers, e-mail address and fax number for each heir		
Particulars of the estates of pre-deceased spouse (full names, date of death, place of death, masters office and estate number) (if applicable)		
Full particulars of savings, cheque, investment accounts		
Income tax reference number		
In case of death as a result of unnatural causes, the particulars of the SA police office investigating the matter, name and contact details of the investigating officer and case number		
If the value of the estate is below R250 000, then I will need the following additional documents		
Copy of motor vehicle registration certificates		
Copy of fire-arm licences		
Copy of municipal services and rates accounts		
Copy of details of shares held in companies		
Copies of latest bank/investment statements at all financial institutions		
Full particulars of the liabilities and latest statements (if available and applicable)		