



VAN VELDEN - DUFFEY

ATTORNEYS • BABUELEDI • PROKUREURS

**THE FOLLOWING INFORMATION OR DOCUMENTS SHOULD BE TAKEN ALONG WHEN YOU SEE
YOUR ATTORNEY TO REPORT A DECEASED ESTATE:**

1	Original will	
2	Van Velden-Duffey form with information on report of estate (attached hereto) complete fully	
3	Copy of identity document of deceased	
4	Copy of the identity document of the executor	
5	Proof of address of the executor not older than 3 months	
6	Death certificate of deceased	
7	Notification / register of death / stillbirth: Form 83/BI-1663 (that is the form that is filled in, usually at the funeral undertaker, to apply for the death certificated)	
8	Copies of identity documents of deceased children	
9	Copies of identity documents of all heirs	
10	Copy of marriage certificate	
11	Copy of decree of divorce and deed of settlement	
12	Copy of death certificate of predeceased spouse	
13	Copy of liquidation and distribution account of predeceased spouse (i.e. estate account that the executor or his agent would have had to lodge with the master in which all the assets and liabilities of the estate are amongst others listed)	
14	Copy of marriage contract	



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Van Velden-Duffey Incorporated / Reg No / 1998/003772/21

LEVEL 4 Contributor to B-BBEE

15	VAT number of deceased	
16	Last financial statement of deceased drafted by auditors or accountants	
17	Original title deeds for fixed properties or copies if originals not available	
18	Details of mortgagees (banks holding mortgage bonds) and last statement	
19	Lease contracts for fixed properties	
20	Information regarding any usufruct over the fixed properties	
21	Valuation report of capital assets such as immovable property as at 1 October 2001 for Capital Gains Tax purposes	
22	Original motor vehicle registration certificate ("RC1")	
23	Firearm licenses	
24	Financial statements of companies or closed corporations in which the deceased had interests	
25	Share certificates and particulars of members' interest in CC's	
26	Information on directorship of deceased	
27	Financial statements for businesses of the deceased	
28	Details of time share like last accounts received	
29	Details of life insurance policies and details of brokers	
30	Details of Outstanding debts	
31	Details of the funeral costs	
32	Medical Aid details	
33	Income tax number of the deceased and login details for e-filing	
34	Latest bank account statements	
35	Employer`s details	
36	IRP 5, salary information and any information on outstanding leave remuneration	
37	Details of pension funds	
38	Details of any debtors of the deceased (any person that owed the deceased money)	



39	Name and contact details of auditor or accountant	
40	Information regarding trusteeship of deceased, copies of trust deed and original letters of authority	
41	Details of loan accounts with trusts	

