

#QUICKFACTS

A BEXs KNOWLEDGE SHARING INITIATIVE

“ ***Important information and documentation needed by an executor in a deceased estate*** ”

The following original documents, where applicable:

- Death certificate of deceased;
- Identity document of deceased;
- Marriage certificate;
- Antenuptial contract;
- The original will. Should there be more than one will please ensure that you provide all original wills held.

The following certified documents:

Please Note: Documents must be certified by a Commission of Oaths, the name of the Commissioner must clearly appear on the document, it must reflect the words “a certified true copy” and must be dated). It must be clear copies, made from the original document. If the documents are not clear and are not correctly certified it might delay the estate as it will fail the FICA requirements of financial institutions:

- Identity document of the executor, if BEXs is acting as agent for the executor (minimum 5 copies);
- Proof of address of the executor not older than 3 months, if BEXs is acting as agent for the executor (minimum 5 copies);
- Copy of divorce order (2 copies)

Things not often thought of

It is worth recording log in and password details on a sheet of paper and placed in an envelope for opening after your death. This could be helpful to your family and your executor! Things such as: -

- Social media accounts - Instagram, Twitter and Pinterest;
- Facebook has a handy legacy option;
- Online accounts - like Takealot & Superbalist etc, your family and executor can claim any credit that may be available or accept delivery for items already ordered but not yet delivered

..... *follow the link below for more details*



The following information:

- Details of any fixed properties, the original title deeds and particulars of any home loans i.e. the Bank account number as well as any information regarding credit life cover on the outstanding balance;
- Copies of Life Right agreements should the property in question be part of a Life Right Scheme;

..... *follow the link below for more details*

