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**ESTATE PLANNING QUESTIONNAIRE**

**PLEASE NOTE, THIS QUESTIONNAIRE DOES NOT CONSTITUTE A WILL, THE PURPOSE HEREOF IS TO FACILITATE THE DRAFTING OF A WILL, WHICH THE TESTATOR/TESTATRIX MUST REVIEW, APPROVE AND SIGN BEFORE TWO WITNESSES TO CONSTITUTE A VALID WILL**

**Please complete this form in full by choosing the option that correctly describes the client's information and attach the following documents for all applicants (please tick the documents that will be attached):**

- Copy of your identity document;
- Proof of address in the form of a rates account, Telkom or cell phone account (not older than 3 months);
- Copy of marriage certificate;
- Copy of Antenuptial contract, if applicable;
- Copy of divorce order and settlement agreement, if applicable;

**GENERAL INFORMATION:**

**Application type:**

- New Will
- Review Will

**Note: This estate planning questionnaire will cater for a South African Will only. Should you require a Will to cover your foreign assets, please speak to your BEXs Consultant.**

**Application option:**

**Language preference:**

- Single Will
- Joint Will
- English
- Afrikaans

**APPLICANT 1 – PERSONAL DETAILS**

- Male
- Female

Surname	
First names	
Identity/passport number	
Date of birth (dd/mm/yyyy)	
Occupation	

**Marital status:**

- Married in community of property
- Married out of community of property without accrual
- Married out of community of property with
- Islamic Law
- Widow/Widower
- Single
- Co-habitation
- Civil Union
- Customary law
- Divorced

If married in a country other than SA, please indicate the country

If divorced, specify divorce and/or maintenance obligations if divorce agreement is not attached

**Note: To start on a new line: Alt: Enter**


**Predeceased spouse/s 1:**

Full names of predeceased spouse  
Date of death (dd/mm/yyyy)  
Name of the Master of the High Court/Magistrate to which the estate was reported  
If not sure of the above, state province where the deceased resided at time of death


**Predeceased spouse/s 2:**

Full names of predeceased spouse  
Date of death (dd/mm/yyyy)  
Name of the Master of the High Court/Magistrate to which the estate was reported  
If not sure of the above, state province where the deceased resided at time of death


**Residential/Physical address:**

Unit/Flat number and name  
Street number and name  
Suburb  
Town  
Code


**Postal Address:**

Box Number  
Suburb  
Province  
Code  
E-mail address


Contact number

Cell

Other

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Will the applicant sign by means of a mark?

Is the applicant blind?

**APPLICANT 2 – PERSONAL DETAILS**

Male

Female

Surname  
First names  
Identity/passport number  
Date of birth (dd/mm/yyyy)  
Occupation


**Marital status (please provide copy of marriage certificate where applicable):**

Married in community of property

Married out of community of property without accrual

Married out of community of property with

Islamic Law

Widow/Widower

Single

Co-habitation

Civil Union

Customary law

Divorced

If married in a country other than SA, please state

If divorced, specify divorce and/or maintenance obligations if divorce agreement is not attached

**Note: To start on a new line: Alt: Enter**




**DETAILS OF ASSETS AND LIABILITIES**

The value of the assets should be the current market value. For the liabilities, reflect the current amounts due. Incorrect information will affect the liquidity and estate duty calculations

<b>SOUTH AFRICAN ASSETS</b>				
<b>Asset type</b>	<b>%</b>	<b>Asset description</b>	<b>Applicant 1</b>	<b>Applicant 2</b>
Residential property 1				
Residential property 2				
Residential property 3				
Agricultural property 1				
Agricultural property 2				
Agricultural property 3				
Vehicle 1				
Vehicle 2				
Vehicle 3				
Equipment & machinery				
Livestock				
Shares, stocks & Bonds on JSE				
Loan owing from Trust				
Insurance policies payable to estate				
Unit Trust				
Cash:				
Savings & cheque accounts				
Fixed deposit				
Other investments				
Partnership interest				
Sole proprietorship				
Private Company:				
Value of shares				
Close Corporation:				
Value of member's interest				
<b>TOTAL ASSETS</b>			R	- R

<b>SOUTH AFRICAN LIABILITIES</b>				
<b>Liability type</b>	<b>%</b>	<b>Asset description</b>	<b>Applicant 1</b>	<b>Applicant 2</b>
Bonds over all residential properties				
Bonds over all agricultural properties				
Instalment Sale Agreements on all Vehicles				
Instalment Sale Agreement on Equipment & machinery				
Overdraft cheque accounts				
Other debt:				
Shopping cards (e.g.) Woolworths, Markams, Edgars etc.)				
Loan agreements				
Sole proprietorship				
Partnership				
Private Company:				
Loan account				
Close Corporation:				
Loan account				
<b>TOTAL LIABILITIES</b>			R	- R

**FOREIGN ASSETS INFORMATION**

Do you have a separate Will for the overseas assets:     Applicant 1      Yes      No  
   Applicant 2      Yes      No

In terms of section 4 ( e ) of the Estate Duty Act 45 of 1965 foreign assets, acquired by the deceased, may be excluded from estate duty in the following conditions:

- If the assets were acquired before the deceased became ordinarily resident in the Republic for the first time; or
- received foreign assets after the deceased became ordinarily resident in the Republic for the first time, by-
  - ❖ a donation if at the date of the donation the donor was a person (other than a company) not ordinarily resident in the Republic; or
  - ❖ inheritance from a person who at the date of his death was not ordinarily resident in the Republic; or
- out of the profits and proceeds of any such property proved to the satisfaction of the Commissioner to have been acquired out of such profits or proceeds;

Are the above deductions applicable to you:     Applicant 1      Yes      No  
   Applicant 2      Yes      No

<b>Foreign asset details</b>					
<b>Asset type</b>	<b>%</b>	<b>Asset description</b>	<b>Asset location</b>	<b>Applicant 1</b>	<b>Applicant 2</b>
Residential property 1					
Residential property 2					
Shares, stocks & Bonds					
Unit Trust					
Cash:					
Saving & cheque accounts					
Fixed deposit					
Other investments					
<b>TOTAL FOREIGN ASSETS</b>				R	-

<b>FOREIGN LIABILITIES</b>					
<b>Liability type</b>	<b>%</b>	<b>Liability description</b>	<b>Liability location</b>	<b>Applicant 1</b>	<b>Applicant 2</b>
Bonds over all residential properties					
Overdraft cheque accounts					
Other debt					
<b>TOTAL FOREIGN LIABILITIES</b>				R	-

**LIFE INSURANCE POLICIES PAYABLE TO BENEFICIARIES**

Except "Key man" and Buy & Sell policies

<b>Name of Insurance company</b>	<b>Type of Policy</b>	<b>Life Assured</b>	<b>Beneficiary</b>	<b>Value at Death</b>

**FEES DETAILS**

Consultation fee: No fee is payable

If the directors of BEXs are not the nominated executors, then the consultation fee will be R750 - R850 (depending on circumstances)

The applicant consents to BEXs keeping the original signed will in their safe custody facility  Yes  No

Will storage fee per year: R175 per annum

Estate Planning fees: R2,500 - Should a formal estate plan be required  Yes  No

Liquidity check fees: R900 - Should you require a check to be done on the liquidity in your estate  Yes  No

Executor's fees: Will range from 2,65% to 3,5% (depending on circumstances) on the gross value of the assets. Collection fee of 6% on all income/interest paid and collected to the estate, after date of death.

Trustee fees: Between .80% - 1% p/a (depending on circumstances) on gross capital assets under administration (subject to a minimum fee of R2,500 per annum)  
Set-up fee R2,000  
Upon termination of the trust, or upon BEXs being requested to relinquish trusteeship, for whatever reason, a fixed administrative fee of R3,000 will be levied.

**ALL FEES QUOTED ABOVE, EXCLUDE VAT**

Executor's fees agreed to

**INSTRUCTIONS FOR SINGLE WILL**

Special instructions (e.g. burial, cremation etc.)

**Note:** To start on a new line: Alt; Enter

Special bequest

**Note:** To start on a new line: Alt; Enter

Residue / Remainder of Estate

**Note:** To start on a new line: Alt; Enter

**INSTRUCTIONS FOR JOINT WILL**

Special instructions (e.g. burial, cremation etc.)

**Note:** To start on a new line: Alt; Enter

Special bequest

**Note:** To start on a new line: Alt; Enter

Residue / Remainder of Estate

**Note:** To start on a new line: Alt; Enter

**COLLATION DETAILS**

Collation refers to the process whereby certain gifts received by your children during your lifetime, need to be taken into account during the administration process to equalise the situation.

Do you require any of your descendants to account for gifts received during your lifetime  Yes  No

**GUARDIANSHIP DETAILS**

**Note:** If any of the children are minors, you may wish to nominate a guardian

FIRST NAME & SURNAME OF NOMINATED GUARDIAN	IDENTITY NUMBER	COUNTRY OF RESIDENCE	RESPONSIBLE FOR WHICH CHILDREN	RELATIONSHIP

**TRUST DETAILS**

Provision will be made for the creation of a testamentary trust for a minor in your estate/s. Please indicate at what age of the beneficiary the testamentary trust should terminate and the assets of the trust distributed to him/her. Should you not stipulate any age in the application form, the testamentary trust will terminate when the beneficiary reaches the age of majority, which is currently 18 years.

Age of majority (18 years)  Yes  No Specify age

Specify any additional trust provisions or requirements

**Note: To start on a new line:**

**Alt: Enter**

Trust for other purposes e.g. estate planning, maintenance of parent, surviving or divorced spouse, person with disability or insolvency

Specify any additional trust provisions or requirements

**Note: To start on a new line:**

**Alt: Enter**

**DETAILS OF FINANCIAL PLANNING PARTNER**

Name of Financial Planner	<input type="text"/>		
E-mail address of Financial Planner	<input type="text"/>		
Contact number	Cell <input type="text"/>	Other	<input type="text"/>

**GENERAL**

**This document does not constitute a valid Will.**

I/we, nominate Sean Beagley and/or Elna Van der Walt currently from Bespoke Executor Services (Pty) Ltd ("BEXs") as Executor and Trustee of my/our estate.  Yes

I/we, Nominate  as Executor and Trustee of my/our estate.

I/we, Nominate  as Co-executor and co-trustee of my/our estate.

Our Terms and Conditions are on our website and can be viewed under the "legal stuff" heading, but should a copy of these be required we could email it to you.

**The Will storage fee, Trustee fee and Executor fee have been discussed and agreed with the applicant/s by the consultant during the interview.**  Yes  No

I hereby consent to BEXs retaining my personal information for the purposes of Fiduciary Solutions and, for the duration of our relationship  Yes

**I certify all information provided in this questionnaire is true and correct to the best of my knowledge.**

Date (dd/mm/yyyy)

**If a hard copy is printed, please sign below**

**SIGNATURE OF APPLICANT 1**

**SIGNATURE OF APPLICANT 2**

Please accept terms and conditions