

WILLS QUESTIONNAIRE



Language: ☐ Afr ☐ Eng

Date: _____

Will Of Type: ☐ Joint Will ☐ Single Will for Testator (Male) ☐ Single Will for Testatrix (Female)

Marital Status: ☐ Unmarried ☐ C.O.P ☐ ANC ☐ WIDOW/ER ☐ DIVORCED

Married according the Laws of _____

Testator (Male)

1. Full name and surname: _____
2. Identity Number: _____
4. Tel no: (c) _____
5. Email address: _____

Testatrix (Female)

1. Full name and surname : _____
2. Identity Number: _____
3. Tel no.: (c) _____
4. Email address: _____

Your will can make provision for your assets to be divided in the following ways:

- A. **Collectively**
 - all assets to someone specific
- B. **Special Bequest**
 - specific assets can be left to specific beneficiary(ies)
- C. **Cash legacy**
 - a specific sum of cash can be left to specific beneficiary(ies)

If B. or C. above are selected then D. also needs to be selected.

- D. **Residue**
 - this is the remainder/balance of your estate, to be left to a specific beneficiary or to multiple beneficiary(ies).

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Company Reg. No.: 2012/018715/21 | Deeds Office Lodgement No.: JHB 465 | PTA 1681
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Associates: Trusha J.A. Dalpat (LLB), Yolandi Schoeman (LLB), and Salochana Packery (LLB)

WILLS QUESTIONNAIRE

Once you have decided who will inherit your assets, let's begin:

I / We leave my estate to:

Select the applicable:

☐ Estate to the Survivor of us

With Simultaneous Death or Death of Survivor:

☐ Estate to Child(ren) / Beneficiary(ies)

Failing a Child(ren) / Beneficiary(ies):

☐ his / her share to issue per representation (meaning to his or her children)

☐ his / her share to the surviving Child(ren) / Beneficiary(ies)

Beneficiary (ies) Information:

Name(s)	Surname	Relationship	Gender	ID/Date of Birth

Are any of the child(ren) / beneficiary(ies) who will inherit minors? ☐ YES ☐ NO

If Yes, complete the following:

Should we Include Trust Provisions in Will? ☐ YES ☐ NO

If Yes, complete the following:

Nominated Trustee/s: (These are the individuals that will administer the Trust of the minor beneficiaries)

Name(s)	Surname	Relationship	ID/Date of birth

Trust termination beneficiary age: (This is the age when you would like the Trust to end and the trust assets to be transferred to the beneficiary(ies))

☐ 18 ☐ 19 ☐ 20 ☐ 21 ☐ 22 ☐ 23 ☐ 24 ☐ 25

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Does your minor child(ren) need a guardian(s)?

☐ YES☐ NO

If Yes, complete the following:

Guardian (s):

Name(s)	Surname	Relationship

Instructions / Notes:

(If there is anything you would like to add, please complete below)

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Family fatality/Wipe out:

(Should none of the above beneficiaries survive you), to whom should your estate go to?

Joint Estate/Separate Estates (underline which is applicable)

Testator (Male):

Beneficiary(ies) Information:

Name(s)	Surname	Relationship	Gender	ID/Date of birth

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Testatrix (Female):

Beneficiary (ies) Information:

Name(s)	Surname	Relationship	Gender	ID/Date of birth

Instructions:

☐ beneficiaries to Inherit equally

If not, please specify below:

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Executor:

1. Kindly note that our company will be appointed as the Executor by default.
2. Should you wish nominate a family member or friend as the Executor, such individual will be the Alternative Executor.

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If number 2 is applicable, kindly complete the column below:

☐ **Vice Versa (Surviving Spouse)**

or

Name(s)	Surname	Relationship	ID/date of Birth

Special Wishes:

☐ **Cremation**☐ **Burial**

☐ Organ Donation

☐ **Living Will**

Organ Donor Foundation SA details:

1. Contact number: 0800 22 66 11 (toll free)
2. Register with your cell phone via the following link: <https://www.odf.org.za/>

Once you've completed your registration, you will receive a call from the Organ Donor Foundation to confirm your details. If you have not received a call from them within 10 days, then please contact the Organ Donor Foundation on 0800226611 or email megan@odf.org.za

Notes:

(If there is anything you would like to add, please complete below)

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