

WILL APPLICATION FORM

Will to be drafted in	Afrikaans		English	
Living will	Yes		No	
Gross value of Applicant's estate				
Gross value of Spouse's estate				
Single will for each party		OR Joint will		

1. MAIN APPLICANT:

Surname		Maiden name (?)	
Full names			
ID no		Cell phone	
Telephone - Work		Telephone - Home	
E-mail			

2. SPOUSE:

Surname		Maiden name	
Full names			
ID no		Cell phone	
Telephone - Work		Telephone-Home	
E-mail			

3. ADDRESS DETAILS:

Street address			
		Postal code	
Postal address			
		Postal code	

4. MARITAL STATUS:

Please indicate which one of the following is applicable:

Out of Community without accrual		Out of Community with accrual		In community		Unmarried		Religious marriage	
Divorced		Widow/widower		Married in foreign country		Civil union		Customary law	

5. CHILDREN:

(All children, including children born out of wedlock, adopted children, and children from previous marriage)

Full names	ID no / date of birth

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6. GUARDIANSHIP:

(If children are minors)

1. Name & Surname		ID no	
2. Name & Surname		ID no	
3. Name & Surname		ID no	
Relationship			
Cell numbers	1.	2.	

7. OTHER BENEFICIARIES

(Information of any other person who receives a benefit under the will)

Full names and surname	ID no / date of birth

8. SPECIAL WISHES:

	Main Applicant	Spouse
Cremation	<input type="checkbox"/>	<input type="checkbox"/>
Burial	<input type="checkbox"/>	<input type="checkbox"/>
Donation of organs	<input type="checkbox"/>	<input type="checkbox"/>

9. DOES AGRICULTURAL OR FARM LAND FORM PART OF THE ESTATE? YES NO
10. LEGACIES (SPECIAL BEQUESTS):

Except for the heirs listed in Point 11 hereunder, are there any special bequests of specific assets or cash?

Main applicant	

Spouse	

11. HEIRS/BENEFICIARIES:

If the Main Applicant is first dying

Spouse alone to inherit:

Yes

In case of the Spouse not inheriting the whole of the estate, list beneficiaries with applicable assets or percentages:

If the Spouse is the first dying

Main Applicant alone to inherit: Yes

In case of the Main Applicant not inheriting the whole of the estate, list beneficiaries with applicable assets or percentages:

In the event of simultaneous death

All the children to inherit:

Yes

In case of children not inheriting list beneficiaries with applicable assets or percentages:

In the event of complete family death – Applicant, Spouse and children passed away

List beneficiaries with applicable assets or percentages:

12. TESTAMENTARY TRUST

(For minor children, maintenance of parents, maintenance of divorced spouse in terms of a court order, persons with disability, insolvency or bequests to charities)

Name of Trust: _____

Reason for Trust	
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Trust for minor		Up to which age	21		25		Indefinite	
Alternative age								

12.1 TRUSTEES:

SBRO NOMINATED AS INDEPENDENT TRUSTEE

Yes		No	
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Trustee/Co-Trustee

Surname			
Full names			
ID NO		Cell phone	
Telephone-Work		Telephone-Home	
E-mail			

Surname			
Full names			
ID NO		Cell phone	
Telephone-Work		Telephone-Home	
E-mail			

13. EXECUTOR:

(Please note that in the event of nomination of a family member, the Master of the High Court will not appoint the nominated person unless that person is qualified to act or is duly assisted by an auditor, attorney or trust institution. SBRO has highly qualified members with the necessary experience who is prepared to take nomination as executor / trustee or in capacity as co-executor with the family member.)

SBRO NOMINATED AS EXECUTOR **CO-EXECUTOR**

Other Executor / Co-executor:

Surname			
Full names			
ID NO		Cell phone	
Telephone-Work		Telephone-Home	
E-mail			

14. EXISTING TRUSTS / INTER VIVOS TRUSTS

In the event that a succeeding trustee must be nominated:

All children to be appointed as trustees All children above certain age to be appointed: age?

Main Applicant / Spouse to nominate?	Name and Number of Trust	Full names, ID number and relationship of succeeding trustee	RSA resident? (Yes/No?)

15. OUTSTANDING LOANS / LOAN ACCOUNTS DUE TO MAIN APPLICANT / SPOUSE

List any loans due to the Main Applicant or Spouse by a person, trust or business entity, which must be bequeathed back to that specific person, trust or business entity in order for the loan to be “written off”

16. FOR COMPLETENESS SAKE YOU CAN PROVIDE US WITH A SCHEMATIC DEPICTION OF THE ENTITIES IN THE STRUCTURE (IF ANY)

THE FOLLOWING INFORMATION WILL BE IMPORTANT:

- **REGISTERED NAMES AND NUMBERS OF THE IMPORTANT ENTITIES (IF ANY)**
- **WHO IS THE TRUSTEES OF TRUSTS (IF ANY)**
- **WHO IS THE SHAREHOLDERS OF THE COMPANIES / MEMBERS OF THE CC (IF ANY)**

17. FOR COMPLETENESS SAKE YOU CAN PROVIDE A SUMMARY OF YOU AND YOUR SPOUSE'S INSURANCE PORTFOLIO (IF ANY)

