

# What documents and information do I need to report a deceased estate?

The following information or documents should be taken along when you see your attorney to report a deceased estate:

1. Original will
2. Copy of identity document of deceased
3. Copy of the identity document of the executor
4. Proof of address of the executor not older than 3 months
5. Death certificate of deceased
6. 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)
7. Copies of identity documents of deceased children
8. Copies of identity documents of all heirs
9. Copy of Marriage certificate
10. Copy of Decree of divorce (if divorced on date of death) and deed of settlement
11. Copy of Death certificate of predeceased spouse
12. 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)
13. Copy of marriage contract

14. Net value of surviving spouse's estate (assets less liabilities) as on date of death if married out of community of property with the accrual system;
15. VAT number of deceased
16. Last financial statement of deceased
17. Original title deeds or copies if originals not available for fixed properties
18. Lease contracts for fixed properties
19. Information regarding any usufruct over the fixed properties
20. Valuation report of capital assets such as immovable property as at 1 October 2001 for Capital Gains Tax purposes
21. Motor vehicle insurance details and original registration form (please supply us with the year, model and mileage of the vehicle)
22. Particulars of firearms, their licenses and details of the possessor
23. Financial statements of companies or closed corporations in which the deceased had interests
24. Share certificates and particulars of members' interest in CC's etc.
25. Information on directorship of deceased
26. Financial statements for business of the deceased
27. Details of time share like last accounts received
28. All available information and documents on insurance policies (long and short term) and contact details of brokers
29. All details and available documentation on outstanding accounts in the name of the deceased (remember the telephone bill and municipal account)
30. Details of the funeral costs (account or receipt as well as funeral policy if applicable)
31. Medical Aid details

32. Any information or documentation on the income tax of the deceased
33. Bank cards and account statements
34. Employer`s details
35. IRP 5, salary information and any information on outstanding leave remuneration
36. Details of pension funds
37. Details of any debtors of the deceased (any person that owed the deceased money)
38. Name and contact details of auditor or accountant
39. Information regarding trusteeship of deceased, copies of trust deed and original letters of authority
40. Details of loan accounts with trusts
41. Details of dependants' immediate financial needs

You can complete a will instruction sheet here: [Testament Instruksievel](#) / [Will Instruction Sheet](#)