# Because I care ...

I thought I'd share some details which will hopefully save some headaches at some point but give me some peace of mind now.

Full Name	
ID Number	
Date of last update	

## Important Documents Checklist (Tick and number)

Item	Description	# Tick
1.	My original will (Copy on file with location of original specified if different)	
2.	Certified copy of my South African Identity Document	
3.	Certified copy of my passport(s)	
4.	Certified copy of spouses ID	
4.	Certified copy birth certificate of child/other beneficiaries	
5.	Certified copy of my birth certificate	
6.	My marriage certificate	
7.	Divorce papers	
8.	Marriage contract	
9.	Drivers license	
10.	Firearm license	
11.	Title deeds for property owned in my name	
12.	Vehicle Registration Certificates for vehicles in my name	
13.	Lease Agreements on Property Rented	
14.	Hire Purchase agreements	
15.		
16.		
17.		
18.		

## Personal Contacts

Family, Friends, Religious Leader, Guardians for minor children, care giver for pets etc

Nature	Name	Email or phone

## Professional Contacts

Doctor, lawyer, accountant, financial advisor, banker, broker, trustee, employer, business partner(s), executor, administrator

## Business Ownership

Name of Business	
Type of Business	
Shareholders Agreement	
% Ownership	
Bank detail & Accountant	
Key business contact person	
ID or Registration #	
Buy/Sell Agreements	

## Trust(s) I founded

Name of Trust	
Registration #	
Domicile of Trust	
Trustee contact	

## Trust(s) I am a beneficiary of

Name of Trust	
Registration #	
Domicile of Trust	
Trustee contact	

## My Personal Tax Details

Tax Domicile	
Tax Reference Number	
Tax filing platform/link	

## **Financial Accounts**

Bank, savings, unit trusts, pensions, annuities, stock-broking, endowments

Institution & Domicile	Account/Investment/Policy Number	Email or phone

### **Insurance Policies**

Life, disability, critical illness, medical, gap cover, home loan, short term, pet.

Institution	Account/Investment/Policy Number	Email or phone

## Regular payments & debit orders

Municipal rates, rent, water, electricity, security, levies, telephone, internet, memberships, education, time share, subscriptions, charity, insurance premiums.

Institution	Account ID or Number	Email or phone

### Debts or loans outstanding

Credits cards, store cards, home loans, overdraft, personal loans

Institution	Account ID or Number	Email or phone

My Digital Life Passwords & PINS for PC, laptop, tablet, mobile phone, website accounts, social media, online banking, loyalty programs, music, photo's, blog

Device/Platform/Link	User Name	Password, PINS, Authentication type

## Additional Documents

Living will	Or advance directive. Purpose is to give guidance to family & doctors when you can speak for yourself. Can cover organ donation and express your wishes about life support.	
Letter of wishes	Designed to sit alongside your actual will & to speak out where the will cannot. It should give guidance to executors, trustees and family as to your thought process around how you structured your will and the intention behind certain decisions or wishes. Key to managing expectations and mitigating the potential for conflict.	
Funeral requests	Preferred arrangements in terms of place of worship, type of service, burial or cremation, what to do with your ashes, celebration, music etc.	