

# J V HART

EXECUTORS OF ESTATES

## ESTATE PLANNING INSTRUCTION

<b>1. PERSONAL PARTICULARS</b>																						
1.1	Surname:	Identity Number: <table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																				
1.2	First Names:	Date of Birth:																				
1.3	Residential Address:	Postal Address:																				
1.4	Home Tel:	Nationality:																				
	Business Tel:	Occupation:																				
	Cell:	E-mail:																				
1.5	If married, or to be married, spouse's full names	Date of marriage:																				
	Identity No. <table border="1" style="display: inline-table; width: 150px; height: 15px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																					Place of marriage:
1.6	Is marriage or will marriage be:	ANC?																				
		ANC with Accrual?																				
		In Community of Property?																				
<b>2. CHILDREN</b>																						
FULL NAMES	SEX M/F	DATE OF BIRTH																				

<b>3. BEQUESTS</b>		
3.1	Are there any special bequests you wish to make? The bequests could be cash or physical assets. Example: you could bequeath R1000 to the SPCA or your jewellery to your sister?	
3.2	Are there any special circumstances that need to be addressed in your family? Example: a handicapped child or dependant parent.	
3.3	Would you like to leave the estate duty portion of your estate (presently R3,500,000) to a Trust, for the benefit of your family?	
3.4	If there is to be a Trust for the benefit of your family: when will the Trust terminate? Example: on your youngest child reaching a certain age.	
<b>4. RESIDUE</b>		
4.1	To whom must the residue devolve upon? (ie: whatever remains in your estate after giving effect to the bequests mentioned above, example: my brother, Joe Allan Bloggs)	
4.2	To whom must your estate devolve upon in the event of the abovementioned heirs dying with you (remember to include this person's relationship to you)?	
<b>5. EXECUTORS AND TRUSTEES</b>		
5.1	Who is to be the Executor of your estate? We suggest one of the following, together with Jackie Seager-Hart of our office: your spouse, parent, sibling or child	Jacqueline Violet Seager-Hart (failing whom the Senior Member of J V Hart CC, or its successors)
5.2	Who is to be the Trustee of your Trust in the event of a Will Trust being created? Again, we suggest a family member and Jackie Seager-Hart of our office	
<b>6. GENERAL</b>		
6.1	In the event of your children being minors, who will be the Guardian of your minor children (especially in the event of both you and your child's father/mother passing away simultaneously)? What is your relationship (ie: sister or brother)	
6.2	Do you have assets in any jurisdiction outside South Africa?	
6.3	Have you signed a Will governing assets outside South Africa?	

6.4	Have you been married previously? If so, will you have to provide maintenance for a previous spouse / child in terms of your Divorce Order?	
6.5	Do you have any contingent liabilities? Example: have you stood surety for anyone?	
6.6	Do any of your heirs reside overseas? If yes, did they formally emigrate?	
6.7	If any movables (example: furniture) are to be awarded and transported to an offshore heir, do you want the Estate to bear the costs or must the heir bear the costs?	
6.8	Do you have sufficient liquidity in your estate to cover possible Estate Duty, Capital Gain Taxes, costs of administration fees, cash bequests etc?	
6.9	Do you wish to be buried or cremated?	
<b>7. LIVING WILL</b>		
7.1	A Living Will is an expression of your wish that you are not kept alive by artificial means for example in cases where there is no reasonable prospect of your recovery from physical illness or impairment which causes you severe distress or renders you incapable of rational existence.	Do you require a Living Will? YES / NO
<b>8. SCHEDULE OF ASSETS</b>		
8.1	Please attach a schedule of your assets and liabilities together with your insurance schedule (should you so wish).	
<b>9. FEES</b>		
9.1	Our fees for a single person's Estate Planning instruction is R650 plus Vat. For a married couple, a total of R950 plus Vat is charged.	
<b>10. FICA</b>		
10.1	Please attach a certified copy of your ID together with a current utility bill	

Signed at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_.

\_\_\_\_\_  
Client

