Practical information to help your family deal with administrative and financial details after your death

If you compile this information and attach it to your Will you will save your Executor and heirs a lot of time and unnecessary stress.

1. Important People: Names and Contact Details

- Executor
- Trustee/s
- Distant family members or friends who should be advised of your death
- Clubs or group in which you participate who should be advised of your death
- Employer
- Attorney
- Financial planner
- Insurance broker
- Stock broker

2. Assets: List of accounts & location of information

- Pension plan
- Bank accounts
- Investment accounts
- Retirement annuities
- Policies – retirement, life assurance
- Money owed to you

3. Liabilities

- Mortgage bond/s
- Credit card accounts
- Loans
- Store credit accounts such as Edgars, Truworths etc.

4. Location of important documents

- Tax documents and anything relevant to SARS such as income tax returns
- Birth certificates – yours, children's
- Will
- Trust Deeds
- Title Deeds
- Policy Documents
- Passports
- Identity Document
- Marriage Certificates
- Divorce Order

5. Other

- Usernames & passwords
- Computer passwords / files where important documents are kept
- Online banking accounts and passwords
- Social media – username and password for platforms Facebook, Twitter and LinkedIn.
- Cellphone - password

NOTE: Keep this document in a very safe place which only you and your spouse and your Executor know about.