



**AITKEN LAMBERT
ELSWORTH** CHARTERED ACCOUNTANTS (S.A.)

Notes for my Executor and Loved Ones

Important Note:

This Form is **not** a substitute for your Will (Last Will and Testament). Your Will must comply with legal requirements to be valid. Keep a copy of this Form with your original Will, which your executor should keep in a safe place.

Instructions for Completion:

1. Organise Your Documents:

- Keep this Form at the front of a file containing all important documents, as listed in section 12 below.

2. Inform Your Executor and Loved Ones:

- Make sure your executor and loved ones know where to find this file and Form.
- Store them in a very safe place to protect sensitive information like passwords.
- If a safe code, key, or other access details are needed to retrieve the file and Form, give these security details to your executor and loved ones separately.

3. Completing the Form:

- You can fill out this Form on your computer or print it out.
- **If you keep this Form digitally, make sure it is protected by a password.**
- Provide the password to your executor and loved ones separately.
- For instructions on how to add a password to this document, refer to the guide [here](#).



Section 1: My Executor's Details

Firm or Person/s	
Contact Person (if applicable)	
Contact Details	

Section 2: My Personal Details

Full names	
Date of birth and ID	
Address	
Telephone and cell numbers	
Email address/es	
Where Last Will and Testament is held	
Details of Living Will/Advance Medical Directive (if any)	
Organ Donor Card	
Tax Reference	
Pets – names, breeds, veterinary practice, allergies, pet insurance details. In Section 12 below state your wishes in regard to pets on your death	
Funeral Policy – see Section 7.3 below	
Funeral arrangements and disposal of my mortal remains – see “My Directives” indexed under Section 12 below	

Other important
personal information

Section 3: Family Details

Section 3.1: Details of My Spouse/Life Partner

Full names	
ID number	
Contact Details	
Marital status (give dates and details of marriage, divorce, foreign marriage, civil partnership etc)	
Other important personal information	

Section 3.2: Details of Children/Other Dependants

Be sure to include the following details for every child/dependant:

Full names | Date of birth | ID Number | Contact Details | Other important personal information

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Section 4: Important Contact People

Instructions for this section: Insert here details of everyone your family or executor may need to contact – Next of Kin, Executor, Attorney, Accountant, Tax Advisor, Insurance Broker, Medical Aid Specialist, Doctor, Financial Advisor, Investment Manager, Banking Contacts, Spiritual/Religious Advisor, Employers, Employees (Business and Home/Personal), Business Partners, Home Service Providers (Plumber, Electrician, Alarm and Response Companies) etc.

Be sure to include the following details for each contact:

Capacity | Full Name | Firm Name | Full Contact Details

Section 5: Physical Assets

Instructions for this section: If you have foreign assets, ask a professional for advice on whether or not you need a separate foreign Will as well as a South African Will. If you have more than one Will, specify which one covers which assets in the “Notes” sections.

Section 5.1: Immovable Property (Houses, Land etc)

Be sure to include the following details for each property:

Description | Address | Where Title Deeds Are | Details of Bonds, Other Important Information | Notes

Section 5.2: Motor Vehicles

Be sure to include the following details for each vehicle:

Description | Registration Number | Location | Finance Agreement | Notes

Section 5.3: Other Valuables or Significant Assets

Be sure to include the following details for each asset: **Description | Location | Notes**

Section 6: Bank Accounts and Investments

Section 6.1: Bank Accounts and Bank Investments

Be sure to include the following details for each: **Bank | Branch | Account Number | Name of Account Holder | Balance | List and location of Cash Cards, Credit Cards etc. | Notes**

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6.2: Other Investments, Financial Assets, Monies Due etc

Instructions for this section: Insert here full details of all your other investments – share or unit trust portfolios, cryptocurrency holdings, interests and loan accounts in private companies, close corporations, trusts, business partnerships, sole proprietorships etc, loans to family or other individuals, other monies due to you or claims against others, etc.

Be sure to include the following details for each:

Investment/Claim Description | Value/s | Broker/Administrator’s Details | Notes

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Section 7: Life Policies, Pensions, Medical Aid etc

7.1: Life, Disability, Accident etc Policies

Instructions for this section: Remember to give details also of any one-off or automatic insurance cover such as credit card travel insurance and the like.

Be sure to include the following details for each:

Life Company | Policy Number | Beneficiaries | Type of Cover | Broker Details | Notes

7.2: Pensions, Provident Funds, Retirement/Life/Living Annuities

Be sure to include the following details for each:

Fund Details | Policy Number | Beneficiaries | Broker Details | Notes

7.3: Medical Aid and Funeral Policy

Be sure to include the following details for each:

Company | Policy Number | Broker Details | Details of Cover | Notes

Section 8: Liabilities (Money you owe)

Be sure to include the following details for each Liability:

Creditor Name | Creditor Contact Details | Details of Liability | Amount Owning | Notes

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Section 9: Accounts, Subscriptions, Monthly Payments, Debit Orders, etc

Be sure to include the following details for each:

Accounts, Subscriptions | Monthly Payments | Debit Orders | Non-recurring or Annual Payments Due | Notes

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Section 10: Passwords, PINs, Codes, Keys, Safes etc

Instructions for this section

- Give full details of the location of things like safes, spare key boxes, security documents, firearm cabinets etc, and of the keys or codes needed to access them.
- Give details of how to access passwords, PIN numbers and access codes, which are a big issue in our electronic age but often overlooked. **Giving these details makes it essential to keep this Information Form and this file secure, and to brief someone separately on how to access them.**
- Your loved ones will need access to your computers, your cell phone, your online accounts, your email, your online payment portal, your Social Media pages, your home alarm and so on. If you use a password manager like LastPass [here](#) look for functions like “Emergency Access” to share your passwords with your heirs, and “Secure Notes” to share information like PINs, safe and alarm codes, location of keys etc.

Section 11: Any Further Information and Notes

Instructions for this section

- Give full details here of anything and everything else your loved ones, advisers or executor may need to know about – ask them if they can think of anything to add.
- You can also use this space to leave any personal messages you have for your loved ones, perhaps explaining why you have divided your estate between them in your Will as you have – and so on.

Section 12: Index of Important Documents

Instructions for this section

- Where your file contains copies of documents, specify against each one where the originals are located.
- Delete/Add/Change below as needed.
- Recommendations:
 - Include a "My Directives" section. For any particular wishes in regard to funeral arrangements, cremation or other disposal of your mortal remains, wishes in regard to how you would like heirs to use their inheritances, wishes in regard to your pets etc, that a professional confirms should not/need not be in your Will itself, leave a signed Directive giving details (or referring to any instructions in your Will).
 - Include the ID documents of yourself, spouse/life partner, children, dependants, heirs, beneficiaries, guardians etc.
 - Include other important family documents such as marriage certificate, ante-nuptial contract, divorce order, cohabitation agreement, maintenance agreement and so on.
 - Include Documents relating to assets and liabilities - title deeds, vehicle registration papers, trust deeds (and letters of authority), rental agreements, loan agreements, acknowledgments of debt, lease agreements, insurance policies, life policies, tax returns, tax records, CGT valuations; anything your family or executor may need to access quickly and easily.

1. My Will ("Last Will and Testament")
2. My Living Will/Advance Medical Directive
3. My Directives
4. Copies of ID documents
5. Other important family documents
6. Documents relating to assets and liabilities
7. Other documents (specify)

Date

Disclaimer: This document and the material and notes provided herein should not be used or relied on as professional advice. No liability can be accepted for any errors or omissions nor for any loss or damage arising from reliance upon any information herein, nor from your use of this document. Always contact a professional for specific and detailed advice.