DECEASED ESTATE ADMINISTRATION

TO DO LIST - ON THE DEATH OF A LOVED ONE

- Make list of names and contact numbers – to inform all friends and family/colleagues of death of the deceased.

- Contact funeral director – they will take care of all the arrangements for burial or cremation
    - They will require payment upfront (check if there is a funeral plan/policy for a specific funeral services)
    - Draft a pamphlet for the funeral service – some funeral homes offer this service
    - Arrange flowers & refreshments for the funeral service (if applicable) – some funeral homes offer this service

- Check for any other funeral policies and obtain forms to submit a claim ASAP.

- Write an obituary and post it the local newspaper/social media together with details of funeral reception if applicable, also post on social media platforms where applicable

- Collect the death certificate (often at funeral home or at the facility/home where person died) and take to home affairs to register the death and obtain official Unabridged death certificate
    - Make a few certified copies of this death certificate

- Take ID book of deceased to police station and have stamped with deceased stamp
    - Make a few certified copies of the ID book

- Continue to Pay any outstanding accounts you receive in the mail - keep record of this for the executor

- Cancel any contracts on the deceased name such as cell phone account etc. any other accounts such as rates & taxes, Telkom, short term assurance etc. (monthly bills) will be transferred in name by the executor. But accounts such as Vodacom on deceased name can be stopped immediately as a contract expires on death of a person. So even if the contract still had a few months left, it can be cancelled immediately.

- Obtain copy or original will if stored by the deceased and contact the executor nominated in the will. The executor will provide list of documents and information needed to register the will at the master's office. The executor will take over many of the financial transactions from there on.
    - Put together all the required documents and information needed for the executor

- Contact any life assurance companies where the deceased had any Life Assurance or Retirement Annuity/Pension Income policies or investments - with a beneficiary nomination and submit a claim. – They will send forms to be completed.

- Where no beneficiary is nominated on the policies, this will be dealt with by the executor.

- Should you need financial assistance and you have not been able to claim any life assurance etc. you can go to the bank and apply for bridging finance whilst the estate is being wound up.

TYPICAL DOCUMENTS NEEDED BY THE EXECUTOR

- Original signed will.
- Original ID
- Original death certificate
    - (the above documents are returned to you once the estate has been finalized. I will give you certified copies in case you need it for anything).

- Bank account statement/s.
- Antenuptial or Pre-Nuptial contract.
- Statement of any bonds outstanding to banks.
- Copies of statements for any retail accounts i.e. Edgars etc.

- DSTV account detail – number if possible.
- Copy of municipal account on properties.
- Original deed of transfer on properties, or if still bonded, then copies.
- Medical aid detail – name and number of memberships.
- Short term insurance detail – schedule if possible – otherwise name and number.
- Cell phone – recent account – kindly confirm if it is on contract or pay as you go.
- Vehicle registration & licensing documents.
- Lis of policies and investments, shares certificates etc.
- SARS – latest assessment (2019) if available.
- Any tax certificates received to date for 2020 tax year.
    - Details of accountant that did annual tax returns.
- List of all assets and their value – e.g. Property, household goods, personal effects, vehicles etc.
- List of any valuable items such as jewellery, art etc.
- Did the deceased own any firearms? Then original firearm licences.
- Detail on any funeral policies / Edgars club card funeral plan etc?
- Funeral parlour - invoice and any related invoices to the funeral (catering, flowers etc). If you have paid these, then proof of payment to reimburse you from the estate.

<u>You will also need to obtain the following information on the deceased for the executor</u>

Where was deceased borne (place of birth)'

Maiden surname (if female)

Her/her parents full names

Was she/he a widow or divorced at time of death?

If divorced – then copy of divorce certificate/contract

If widowed – then full names and ID number of her/his late husband/wife, date of his/her death, ESTATE file number, place of death, and place where they were married – copy of their marriage certificate if possible. If you have copy of his/her will and/or Estate - Liquidation and Distribution account available, that will be a great help, if not, then the executor's details who dealt with the estate.

THERE MIGHT BE ADDITIONAL DOCUMENTATION OR INFORMATION THAT THE EXECUTOR REQUIRES DEPENDING ON THE NATURE AND ASSETS OF THE ESTATE.