

Specific documents or information of the deceased

The executor needs specific documents of the deceased to speed up the administration process. If certain documents, such as title deeds of fixed property or share certificates, cannot be traced, the executor must obtain duplicate documents at the expense of the estate, which may create a delay.

The types of documents normally required include:

- ④ Last signed original will (or particulars of where it can be found)
- ④ Deceased's identity document
- ④ Death certificate
- ④ Marriage certificate
- ④ Antenuptial contract (if applicable)
- ④ Name and date of death of any predeceased spouse (if applicable)
- ④ Divorce order and deed of settlement (if applicable)
- ④ Copies of identity documents of all heirs
- ④ Copies of marriage certificates of all heirs
- ④ Postal addresses and contact particulars of all heirs
- ④ Name and address of deceased's employer
- ④ Deceased's employee number
- ④ Retirement Fund number, name and address of pension fund
- ④ Membership number, name and address of medical fund
- ④ Income tax reference number and office where registered
- ④ VAT registration number (if applicable)
- ④ Title deeds, sectional title deeds, timeshare certificates or particulars where obtainable
- ④ Lease contracts
- ④ Firearm licences
- ④ Vehicle registration certificates
- ④ Share certificates or name of institution where portfolio is managed or electronically kept in custody
- ④ Unit trust certificates or notices
- ④ Any other investment certificates
- ④ Last cheque book and current or savings account bank statement



- ④ Credit cards and statements
- ④ Mortgage bonds or the name of the institution
- ④ Promissory notes in respect of loans owed to the estate
- ④ Credit cards and any other bank cards
- ④ Life insurance policies, or full particulars thereof
- ④ Short-term insurance policies, or full particulars thereof
- ④ Details of safety deposit boxes at any banks
- ④ Partnership agreements, purchase and sell agreements and latest financial statements in respect of any business being operated (if applicable)
- ④ Deeds of sale in which the deceased had an interest
- ④ Details of all debts owed by the deceased including accounts at retail stores; pharmacy etc.
- ④ Information on debit and stop-orders
- ④ Funeral costs
- ④ Funeral and burial or cremation costs form part of the claims against the estate and are payable from the funds of the estate.
- ④ Should these have been paid already that person may be refunded by the estate.

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