

PERSONAL DOCUMENTS

Attached	To follow	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Original bar-coded identity document of the deceased *
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Original death certificate *
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Certified copy of the DHA-1663 (also known as BI-1663 - available from the funeral undertaker)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. 3 Certified copies of the marriage certificate (if not in English then 3 certified copies of the English translation thereof)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Ante Nuptial Contract (ANC), if married out of community of property
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Original signed will, if not with CMV Trust
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Divorce Order(s) and Settlement Agreement(s), if deceased was previously divorced
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. Death certificate, last will and testament and Letters of Executorship of a predeceased spouse

*original documents will be returned to family upon finalisation of the estate

ASSETS

Attached	To follow	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fixed property:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Original title deed(s), if available
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Latest bond account statements and details of credit life insurance, if any
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Copy of homeowners insurance policy
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Lease agreement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Latest city council and levy accounts
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Capital gains tax valuations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vehicles:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Original certificate of registration, if available, alternatively copy of the latest licence document
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Firearms:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Original licences
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank accounts:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Full details of savings, cheque, transmission or investment account with banks as well as cards relating to the accounts
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Statements of the accounts as close to date of death as possible
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investments:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Statements of accounts as close to date of death as possible
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Insurance:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Details of all insurance policies owned by the deceased and proof thereof
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Business interests:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Contact details of bookkeeper and latest financial statements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Original share certificates, if a private company
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. CK documents, if a close corporation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Partnership agreement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Buy and Sell Agreement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Keyman Insurance policy details
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Loan accounts due to the deceased



REPORTING OF A DECEASED ESTATE

List of required documents / information

GENERAL

Attached	To follow	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Latest pension statement if deceased was a pensioner
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Latest payslip if deceased was employed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Other

HEIRS

Attached	To follow	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. 3 x Certified copies of spouse's identity document, if married
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. 1 x Certified copy of each child's identity document / birth certificate
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Proof of heirs' banking details (bank statement / cancelled cheque / letter by the bank)