



# NORTHWOOD

Financial Services cc

Authorized Financial Services Provider No. 13296

## Last Will and Testament Checklist

Many Financial Planners will tell you that they have a group of clients who hate the idea of drawing up a Last Will and Testament. It usually takes a death in their family to serve as a harsher warning.

To make the task of drawing up your will as simple as possible, why not complete the check list? It takes some of the pain out of the experience.

Your ID Document	
Your Spouse's ID Document	
Dependents ID Documents	

Marriage contract (If <i>not</i> married by COP)	
Divorce Agreement (if previously divorced)	

Fixed Property	Value	Debt
Primary Residence		
Other Fixed Property		

Movable Property	Value	Debt

Number of shares	Company	Shareholder number

Savings and investments	Institution & No of account	Value

Closed Corporations (Name)	CK Number	Number of Shares

**Other Business Interests:**

**Insurance schedule (get this from your financial planner)**

This data should be sufficient to draw up your Will. Now you need to give instructions. To help I am including SUGGESTED instructions.

1	<i>In the event of my death, I would like R950 000 to be set aside in a Testamentary Trust for the benefit of Tarryn, my daughter. Monthly pocket-money from the interest may be paid over to her until the age of 21. At that time the capital should be made available to her.</i>
2	<i>I am the sole proprietor of Happy Painters. My wife must be allowed to pay the staff and to keep this business afloat.</i>
3	<i>My other business "Dry Roof cc" must continue operating. My wife will carry on this business.</i>
4	<i>My wife inherits the residue.</i>