

WILLS

It's never easy to think about your death, as we all believe that we have more time, but if you were to die unexpectedly, will your family be taken care of?

At PKF (PE) Inc. we have an Estates Department that deals with Wills, Will Trusts and the Administration of Deceased Estates on a daily basis.

Please fill in the following questionnaire and we will draft your will for free if you appoint PKF (PE) Inc. to be the Executor or Co-Executor in your Estate.

Full names: _____

Surname: _____

Title:

Mr.
Mrs.
Ms.
Prof.
Dr.
Rev.

Gender:

M	F
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Identity number:

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Physical Address:

☐

Married

☐

Single

☐

Co-habiting

If married, then this drop box must appear:

Married:

Married in Community of Property
Married out of Community of Property – with Accrual
Married out of Community of Property – without Accrual

If they choose one of the married or co-habiting options, then this box opens:

Name & Surname of Spouse/Partner:

Identity number:

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EXECUTOR:

• PKF (PE) Inc.	
• Co-Executor:	
Full names & Surname:	
ID Number:	
Contact Details:	
• Other:	
Full names & Surname:	
ID number:	
Contact Details:	
Bank Details: PKF (PE) Inc. Bank: FNB Account Number: 53410063473 Branch Code: 261050 Ref: Wills (initial & Surname) (If we are not appointed as Executor or Co-Executor, there will a fee of R ____ that has to be paid into the account as stated above, and as soon as you send us proof of payment we will provide you with the will created)	

Beneficiaries:

Major	Minor
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If Major:

Name & Surname: _____

ID Number:

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Bequest:

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In the event that the above person predeceases me or if we die simultaneously, it shall devolve upon his/her issue – or if you do not want it to go to their children to:

Name & Surname: _____

ID Number:

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If Minor:

If you want your assets to bequeath to a minor, it is important to create a Will Trust in your will for their benefit and wellbeing and appoint Trustees who you can Trust to look after your children's financial needs.

We will create and register the Will Trust, while dealing with your estate and transfer all necessary assets into the Trust. If you do not create a will trust the Minors inheritance will be paid into the guardian's fund which is controlled by the State.

Will Trust Name: _____

Names & Surname of Trustees with their ID Numbers and contact details if not the same as Executors:

Names, Surname and ID Number of Beneficiaries in the Will Trust:

At what age can the benefit of the Trust be paid out to the Beneficiaries:

Specific instruction with regards to the Will Trust to the Trustees:

What happens to the amount left in the Trust if all of the beneficiaries of the Trust were to pass away before the Trust can be distributed;

I bequeath the Residue of my Estate to (Full names, surname and ID Number):

In the event that the above person predeceases me or if we die simultaneously, it shall devolve upon his/her issue – or if you do not want it to go to their children to:

Name & Surname: _____

ID Number:

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If the Testator or Testatrix have minor children – Guardians:

Full name & surname: _____

ID No.: _____

Contact Number: _____

In the event that the guardian/s as appointed above predeceases me or if we die simultaneously I nominate:

Full name & surname: _____

ID No.: _____

Contact Number: _____

Last Wish:

In case you want to be cremated or buried in a specific manner:

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