



Judith straat 458 | Waterkloof Glen | Pretoria | 0181  
Posbus 34175 | Glenstantia | Pretoria | 0010  
Tel: 012 998 5309 | Faks: 0865148207

### INLIGTING VIR DIE OPSTEL VAN 'N TESTAMENT/ INFORMATION FOR DRAFTING OF A WILL

Enkel/Single:   
Gesamentlik/Joint:

Taal: Afrikaans   
Language: English

#### 1. **TESTATEUR / TESTATOR**

Van / Surname \_\_\_\_\_

Volle name / Full names \_\_\_\_\_

ID no \_\_\_\_\_

#### 2. **TESTATRISE / TESTATRIX**

Van / Surname \_\_\_\_\_

Nooiensvan / Maidenname \_\_\_\_\_

Volle name / Full names \_\_\_\_\_

ID no \_\_\_\_\_

#### 3. **HUWELIKSTAAT / MARITAL STATUS**

Getroud *Binne Gemeenskap*  *Buite Gemeenskap*  *Met aanwas*   
Married *In Community*  *Out of Community*  *With Accrual*

Ongetroud  Geskei  Wewenaar/ Weduwee  Permanente saamwoning   
Unmarried  Divorced  Widower/ Widow  Living together

Onderhoudseis   
Alimony

**4. ADRES/ ADDRESS**

Woonadres /Residential \_\_\_\_\_  
 \_\_\_\_\_

Posadres / Postal address \_\_\_\_\_  
 \_\_\_\_\_ kode/code \_\_\_\_\_

Tel. no B ( ) \_\_\_\_\_ H ( ) \_\_\_\_\_

E-pos / E-mail address \_\_\_\_\_

**5. KINDERS/CHILDREN Volle name en geboortedatums / Full names and date of birth**

5.1 Huidige huwelik / Present marriage

_____	_____
_____	_____
_____	_____

5.2 Vorige huwelik van testateur / Previous marriage of testator

_____	_____
_____	_____

5.3 Vorige huwelik van testatrise / Previous marriage of testatrix

_____	_____
_____	_____

**6. VERERWING / SUCCESSION**

6.1 Spesiale bemakings /Special Bequests \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

6.2 Testateur eerssterwende  
 Testator first dying

Testatrise enigste erfgenaam  
 Testatrix sole heir

Ja / Yes Nee/No

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

Indien nie / If not:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

6.3 Testatrise eerssterwende  
Testatrix first dying

Testateur enigste erfgenaam  
Testator sole heir

Ja / Yes    Nee/No



Indien nie / If not:

---



---

6.4 Afsterwe van langsewende of  
gelyktydige afsterwe  
Death of survivor or  
Simultaneous death

Kinders enigste erfgenaam  
Children sole heirs

Ja/Yes

Nee/No



Indien nie / If not:

---



---



---

6.5 Gesinsuitwissing / Family obliteration

---



---



---

7 **TRUST VIR MINDERJARIGE ERFGENAME TOT**  
**TRUST FOR MINOR HEIRS TO**

21  25  jaar  Ander  
year Other

8. **ANDER VERSOEKE / FURTHER REQUESTS**

bv/e.g. – begrafnis/funeral, grafsteen/tombstone, verassing/cremation, orgaanskenking/organ  
donation

---



---



---

9. **VOOG/ GUARDIAN**

Naam/ Name

Verwantskap/ Relationship

Adres/ Address

---



---



---



---

10. **TRUSTEE**

11. <b><u>BOEDELBATES/ ESTATE ASSETS</u></b>	<b>Testateur/ Testator R</b>	<b>Testatrise/ Testatrix R</b>
<u>VASTE EIENDOM / FIXED PROPERTY</u> <ul style="list-style-type: none"> <li>• <u>RESIDENTIEEL/ RESIDENTIAL</u></li> </ul>		
<ul style="list-style-type: none"> <li>• <u>PLAAS EIENDOM/ FARM PROPERTY</u></li> </ul>		
<ul style="list-style-type: none"> <li>• <u>ANDER/ OTHER</u></li> </ul>		
<p><b><u>BOERDERY BATES/ FARMING ASSETS</u></b></p> <ul style="list-style-type: none"> <li>• Plaasvoertuie/ Farming vehicles</li> <li>• Implemente/ Implements</li> <li>• Lewende hawe/ Live stock</li> <li>• Oes op lande/ Crops on land</li> </ul> <p><b><u>ROERENDE BATES/ MOVABLE ASSETS</u></b></p> <ul style="list-style-type: none"> <li>• Voertuie/ Vehicles</li> <li>• Meublement/ Furniture</li> <li>• Vuurwapens/ Fire arms</li> <li>• Ander / Other:</li> </ul>		
<p><b><u>SAKEBELANGE/ BUSINESS INTERESTS</u></b></p> <ul style="list-style-type: none"> <li>• Aandele in privaatmaatskappye/ Private company shares (besonderhede/detail)</li> <li>• Leningsrekening/ Loan account</li> <li>• Belang in beslote korporasie/ Close corporation interest (besonderhede/detail)</li> </ul>	<p><b>Testateur/ Testator R</b></p>	<p><b>Testatrise/ Testatrix R</b></p>

• Leningsrekening/ Loan account		
• Vennootskapsbelang/ Partnership interest		
• Eenmansaak/ Sole proprietor		
<b><u>BELEGGINGS/ INVESTMENTS</u></b>		
• Kontantbeleggings/ Cash Investments		
• Verbande (lenings) / Bonds (loans)		
• Effektetrusts/ Unit trusts		
• Genoteerde aandele / Listed shares		
• Leningsverskuldig/Loan indebted (besonderhede/detail)		
<b><u>VERSEKERING BETAALBAAR AAN BOEDEL (INGESLUIT GESEDEER AS SEKURITEIT) / ASSURANCE PAYABLE TO ESTATE (INCLUDING CEDED AS SECURITY)</u></b>		
Heg asb 'n opsomming van versekering aan..... Indien nie beskikbaar kan u ons kontak vir bystand.		
We need a summary of insurance..... Contact us for assistance if not available.		
<b>TOTALE RSA BATES/ TOTAL RSA ASSETS</b>		
<b>12. <u>BOEDEL LASTE / ESTATE LIABILITIES</u></b>		
• Verbande / Mortgage Bonds		
• Oortrokke bankrekeninge / Bank overdrafts		
• Ander skulde / Other debts		
<b>TOTALE RSA LASTE / TOTAL RSA LIABILITIES</b>		

13. **BUITELANDSE BATES /FOREIGN ASSETS**

14. **BUITELANDSE TESTAMENT / FOREIGN WILL**

---

15. **GETEKEN TE/SIGNED AT \_\_\_\_\_ DATUM / DATE:    /    / 20**

**HANDTEKENING/SIGNATURE**

16. **INGESTUUR DEUR/SUBMITTED BY**

Naam / Name                    **Fortunate Brokers**

Tel.no:                            (012) 998 5309

Datum ingedien / Date submitted \_\_\_\_\_

