

Estate Planning Report



Personal Information

Name

Date of Birth

Email

Marital Status

Property Regime

You have the following in place:

☐ Current Will

☐ Trust

☐ Business

☐ Farm

☐ Investment Portfolio

☐ Retirement Fund

Dependents:

☐ Spouse

☐ Children

☐ Stepchildren

☐ Grandchildren

☐ Factual Dependents

☐ Other Dependents

Minor Dependents

Adult Dependents

Objectives of Estate Planning

How important is it for your estate plan to protect your business interests?

What strategies and would you like in place for safeguarding financial resources for retirement?

- | | | |
|--|---|--|
| <input type="checkbox"/> Establish a Trust | <input type="checkbox"/> Set Up Insurance Policies | <input type="checkbox"/> Legal Agreements |
| <input type="checkbox"/> Buy-Sell Agreement | <input type="checkbox"/> Contingent Liability Insurance | <input type="checkbox"/> Diversified Investment Strategy |
| <input type="checkbox"/> Business Succession Planning | <input type="checkbox"/> Debt Repayment Plan | <input type="checkbox"/> Asset Protection Planning |
| <input type="checkbox"/> Separation Personal & Business Finances | <input type="checkbox"/> Other: <input type="text"/> | |

Are you concerned about protecting assets from potential insolvency issues?

How important is it to have provisions in place for your dependents' maintenance?

How high a priority is it for you to minimise taxes?

Are you open to reviewing and updating your estate plan regularly?

Assets

Do you own any real estate properties, such as houses, apartments, or land?

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How many vehicles do you own, and what are their makes, models and estimated values?

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Do you own any valuable possessions such as artwork, jewellery, or collectibles?

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What is the estimated value of your household effects (e.g. furniture, appliances etc)?

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Do you own any intellectual property rights, such as patents, trademarks, or copyrights?

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What is the estimated value of your household effects (e.g. furniture, appliances etc)?

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Do you own any intellectual property rights, such as patents, trademarks, or copyrights?

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Are there assets held in a trust or other legal entities?

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Provide details about your investment portfolio (e.g. stocks, bonds, mutual funds etc)

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Liabilities

Do you have any outstanding mortgage loans?

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Do you have any credit card debt?

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Are there any other outstanding debts or financial obligations that you have?

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Are there any expected changes in your liabilities?

Are there any personal loans you currently owe?

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Are there loans for vehicles you own?

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Do you have a strategy for managing and reducing your liabilities over time?

Policies

Do you currently have any life insurance policies in place?

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Are your properties adequately insured?

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Do you currently have disability insurance?

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Are you aware of any limitation on your disability insurance coverage?

Are you covered by any health insurance policies/ plans that is not a Medical Aid?

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Are your vehicles insured?

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Which type of disability insurance so you have?

Do you have contingent liability insurance for unexpected liabilities?

Have you considered buy-sell insurance to protect your business partners and family?

Do you have key person insurance in place for business continuity?

Do you have any other types of insurance not mentioned?

Have you reviewed your insurance policies recently to ensure they align with your current needs?

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Have you considered obtaining funeral cover?

Estate Duty

Do you bequeath your estate to your spouse?

Are there any conditions or limitations on bequests to your spouse?

Specify the percentage or assets you'd like to leave to your spouse?

What happens to the residue of your estate? Is it bequeathed to your spouse?

Do you bequeath any portion of your estate to a trust?

Is there a farm or specific property bequeathed to a trust?

How should asset differences be managed upon massing?

Current Will Uploaded?

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Executor Fees

No executor's fees are payable on proceeds from policies with a beneficiary nomination, do you have any such policies?

Liquidity Position

Are you aware of any sources of liquidity in your estate?

If there's a shortfall, are you open to heirs contributing cash?

Have you considered selling assets to cover shortfalls?

Have you considered borrowing funds for shortfalls?

Have you considered life assurance for addressing shortfalls?

Maintenance Claims

Are you aware of any existing maintenance obligations?

Have you considered the cost of education in your maintenance planning?

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Have you considered life insurance for maintenance obligations?

Maintenance of Surviving Spouse

Are you considering provisions for maintenance of the surviving spouse?

Would you like to review your existing provisions for alignment with your goals?

What monthly income would be required for your spouse/family/dependents maintenance?

Have you considered life insurance for maintenance obligations?

Have you considered the following factors duration of the marriage, the spouse's age and earning capacity, and the size of your assets.?

Would you like to review these provisions for alignment with your goals?

Provisions for Dependents

Have you assessed capital for generating income for dependents?

Do you have life insurance that is linked to a purpose such as mortgage/ bond life cover etc?

Have you considered additional life insurance for income needs for dependents?

Trusts

Are you familiar with trusts?

Have you considered setting up a trust?

Are any asset protection reasons relevant to your estate planning?

Have you considered the advantages of transferring assets to a trust?

Are you considering donating assets to a trust?

Are you aware of the potential donations tax liability?

Have you considered selling assets to the trust?

Are you familiar with the terms and conditions of a sale agreement?

Transferring assets to a trust can have costs and tax consequences have you considered this?

Investment Trusts

Are you interested in setting up an investment trust?

Does investment trust flexibility align with your goals?

Disclaimer

Disclaimer to be provided.