

Will questionnaire

Personal details:

Title					
Forename(s)					
Surname					
Address					
Date of birth					
Nationality					
Marital status	SINGLE	MARRIED	WIDOW	DIVORCED	COHABITING
Occupation					
Earnings					
Home telephone					
Work telephone					
Mobile telephone					
E-mail					

Are happy for documentation to be sent via e-mail	YES	NO
Would you like to speak to a financial advisor	YES	NO

Previous wills

Do you have a will currently in existence	YES	NO
If yes, who is holding your will and (if applicable) in which county?		

Please provide a brief reason for your request to have a will drafted

Sable Wills

Ground Floor, Block B1, Regent Square, Doncaster Road, Kenilworth, 7708, Cape Town
t: +27 (0) 21 657 2142 | e: wills@sable-group.com | w: www.sable-group.com

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Children

Please provide details of your children below:

Full name(s)	Date of birth	Address	Relationship to you

Executors

Your executors are the people who will deal with distributing your estate to the beneficiaries after payment of any debts, taxes and funeral expenses.

Please provide details of the people you wish to act as your executors. It is best to appoint two executors. It is customary to appoint your partner/spouse in the first instance and then the other people as back-up.

Executors (full names and relationship to you):

Full name(s)	Date of birth	Address	Relationship to you

Substitute executors

Full name(s)	Date of birth	Address	Relationship to you

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Trustees

Your trustees are the people who will deal with distributing your estate to the beneficiaries after payment of any debts, taxes and funeral expenses.

Please provide details of the people you wish to act as your trustees. It is best to appoint two trustees. It is customary to appoint your partner/spouse in the first instance and then the other people as back-up.

Trustees (full names and relationship to you):

Full name(s)	Address	Relationship to you

Guardians

We recommend a guardian to be appointed if you have children under 18.

Full name(s)	Address	Relationship to you

Funeral arrangements

I wish to be

BURIED	CREMATED	NO REFERENCE - to be stated
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Please state any specific wishes in relation to your funeral below. Please note that your family may not read your will until after your funeral, so you should also notify them of any specific wishes beforehand:

Living will

Complete this section if you do not wish to be kept alive by artificial means or be given drugs to hasten death in the event of no reasonable prospect of living, or if you are or would like to be an organ donor, etc.

Property outside of South Africa

Do you own property abroad	YES	NO
If yes, have you made a will in relation to it?	YES	NO
Please provide the location of the will as well as the dated it was signed:		

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Personal items

You can leave items of jewellery or other personal possessions to somebody or a charity. Please be specific in describing the asset and estimate its current value:

Item	Current value	Beneficiary	Relationship to you	Full address of beneficiary including postcode

Money

Amount	Beneficiary	Relationship to you	Full address of beneficiary including postcode

Property

Property address (incl. Land Registry Title No.)	Current value and mortgage details	Beneficiary	Relationship to you	Full address of beneficiary including postcode

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Investments

Investments	Current value	Beneficiary	Relationship to you	Full address of beneficiary including postcode

Life insurance and endowment policies

Life insurance and endowment policies	Current value	Beneficiary	Relationship to you	Full address of beneficiary including postcode

Is your life insurance policy written in trust?	YES	NO
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Charitable gifts

Item or amount of money	Current value	Name of charity	Charity registration number	Full address of beneficiary including postcode

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Residuary estate

I want to give the residue of my estate to:

Full name(s)	Relationship to you	Full address including postcode	What % share are they to receive?

Substitute residuary beneficiaries

If the above-named person(s) die before you or at the same time, who would you like to be the substitute beneficiary/beneficiaries?

Full name(s)	Relationship to you	Full address including postcode	What % share are they to receive?

Please provide any specific wishes in relation to your substitute beneficiary/beneficiaries:

Is anyone mentioned in your will under 18 years of age?	YES	NO
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At what age would you wish them to inherit?

Are you aware of anyone who is likely to challenge your will? (e.g. a former spouse or partner, children)	YES	NO
Have you financially supported anyone?	YES	NO
Have you promised to leave an item or sum of money to anyone that you have not mentioned above?	YES	NO

Please supply any further information here that may be relevant to your will

Full name(s)	
Signed	
Date	

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