

## BOEDELAANMELDING/ESTATE REPORTING FORM

<b>BOEDEL WYLE/ESTATE LATE:</b> _____		<b>DATUM VAN DOOD/DATE OF DEATH:</b> _____	
<b>BRON/SOURCE:</b> _____		<b>EFFICIENT ADVISOR/ADVISEUR:</b> _____	
Kontakpersoon/Contact person : _____		Adres/Address: _____	
Verwantskap / Relationship : _____		_____	
Tel no/Tel no: _____	Faks/Fax : _____	E-pos/Email: _____	

- 1 Voltooi asb die sterfkennis en inventaris volledig en laat dit onderteken word/Please complete the death notice and inventory thoroughly and have it signed.
- 2 Indien BINNE gemeenskap van goedere getroud, moet die bates van die nagelate gade ook in die inventaris opgeneem word/If the marriage was in community of property, the assets of the surviving spouse should also be listed in the Inventory.
- 3 Neem die bates teen 'n realistiese markwaarde in die inventaris op/List the assets in the inventory at a realistic market value.
- 4 Voltooi alle afdelings volledig. Indien dokument aangeheg word, merk "JA" kolom. Indien nie van toepassing, merk "NEE" kolom. Indien dokument nog verkry moet word, merk "VOLG" kolom/Complete all sections of this form in full. If document is attached, tick the "YES" column. If document is not applicable, tick the "NO" column. Should document be applicable, but still to be obtained, tick the "FOLLOW" column.
- 5 Kontak jou Efficient Board of Executors kantoor indien daar enige onduidelikheid is of inligting wat u benodig/Contact the Efficient Board of Executors office concerned should there be any uncertainty or information that you require.
- 6 Verskaf soveel inligting as moontlik. Waar daar onvoldoende spasie is, gebruik 'n aparte bladsy/Furnish as much information as possible. If there is insufficient space use a separate page.

### A. PERSONOOLIKE DOKUMENTE EN INLIGTING BENODIG/ PERSONAL DOCUMENTS AND INFORMATION REQUIRED

		<u>AANGEHEG/ ATTACHED</u>		
1	Testament No/Will No _____ – Efficient Board of Executors/Ander/Other/Geen/None	Ja/Yes	Nee/ No	Volg/Follow
2	Identiteitsdokument van die oorledene / Identity document of the deceased	Ja/Yes	Nee/ No	Volg/Follow
3	Sterftesertifikaat/Death certificate	Ja/Yes	Nee/ No	Volg/Follow
4	Egskeidingsbevel en skikkingsakte, naam & adres van vorige gade & besonderhede van onderhoud betaal / Divorce order and agreement, name & address of previous spouse and information on maintenance paid	Ja/Yes	Nee/No	Volg/Follow
5	Afskrifte van erfgename se identiteitsdokumente & adresse / Copies of identity documents of heirs	Ja/Yes	Nee/No	Volg/Follow
6	Afskrifte van erfgename se huweliksertifikate/Copies of marriage certificates of heirs	Ja/Yes	Nee/No	Volg/Follow

- 7 Taalkeuse/Language ----- Afrikaans / English
- 8 Naam en adres van werkgewer of pensioenfonds en personeelnommer (heg jongste betaalstaat aan)  
 Name and address of employer or pension fund and employee number (attach latest salary advice): \_\_\_\_\_
- 9 Indien die oorsaak van dood onnatuurlik was/In the case of an unnatural death :  
 Gee die presiese omstandighede rondom die dood van die oorledene/Furnish the exact circumstances regarding the death:  
 \_\_\_\_\_  
 Polisiestasie waar gerapporteer/Police station where death was reported \_\_\_\_\_  
 Ondersoekbeampte/Investigating officer \_\_\_\_\_ Saakno/Case number \_\_\_\_\_  
 Indien botsing, is instruksies aan 'n prokureur gegee vir 'n derdeparty eis/In the event of a motor accident, were instructions given to an attorney for a third party claim? \_\_\_\_\_
- 10 Naam en adres van huisdokter/Name and address of family doctor : \_\_\_\_\_
- 11 Naam en adres van mediese fonds en lidnommer/Name and address of medical aid and membership number: \_\_\_\_\_
- 12 Was die oorledene of enige van die erfgename insolvent verklaar? Verskaf besonderhede/Was the deceased or any of the heirs ever declared insolvent? Furnish details :  
 \_\_\_\_\_

13 Was die oorledene voor afsterwe by enige geding betrokke/Was the deceased involved in any litigation before death: Ja/Yes / Nee/No

13.1 Verskaf besonderhede en verstrek naam en adres van prokureur/Furnish details and name and address of attorney:

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14 Inkomstebelastingverwysingsnommer: \_\_\_\_\_ Registrasiekantoor: \_\_\_\_\_  
Income tax reference number: \_\_\_\_\_ Registration office: \_\_\_\_\_

15 Naam en adres van ouditeur/boekhouer/Name and address of auditor/bookkeeper : \_\_\_\_\_

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**B. DOKUMENTE & INLIGTING BENODIG MET BETREKKING TOT BATES/DOCUMENTS & INFORMATION REQUIRED RELATING TO ASSETS**

**AANGEHEG / ATTACHED**

- |    |   |                              |
|----|---|------------------------------|
| 1  | Transportaktes/Deeltitelaktes/Sertifikaat van mineraalregte/<br><u>Title deeds/Sectional title deeds/Certificate of mineral rights</u>  | Ja/Yes Nee/No Volg/To Follow |
| 2  | <u>Huurkontrakte/Lease Agreements</u>   | Ja/Yes Nee/No Volg/To Follow |
| 3  | <u>Vuurwapenlisensies/Firearm licence</u>   | Ja/Yes Nee/No Volg/To Follow |
| 4  | <u>Motorvoertuigregistrasiesertifikate/Motor vehicle registration certificates</u>  | Ja/Yes Nee/No Volg/To Follow |
| 5  | <u>Aandeesertifikate (privaat- &amp; publieke maatskappye)/Share certificates (private &amp; public companies)</u>  | Ja/Yes Nee/No Volg/To Follow |
| 6  | <u>Groeifondssertifikate/Growth fund certificates</u>   | Ja/Yes Nee/No Volg/To Follow |
| 7  | <u>Deelnemingsverbandsertifikate / Participation Mortgage Bond certificates</u>   | Ja/Yes Nee/No Volg/To Follow |
| 8  | <u>Vaste deposito sertifikate/Fixed Deposit Certificates</u>  | Ja/Yes Nee/No Volg/To Follow |
| 9  | <u>Tyddeelsertifikate /Time Share Certificates</u>  | Ja/Yes Nee/No Volg/To Follow |
| 10 | <u>Ander beleggingsertifikate/Other Investment certificates</u>   | Ja/Yes Nee/No Volg/To Follow |
| 11 | <u>Spaarboekies/OTM Kaarte/Savings account books/ATM cards</u>  | Ja/Yes Nee/No Volg/To Follow |
| 12 | <u>Huidige tjekboek/ Current cheque book</u>  | Ja/Yes Nee/No Volg/To Follow |
| 13 | <u>Verbandaktes tov verbande aan oorledene verskuldig/Bonds in favour of the deceased</u>   | Ja/Yes Nee/No Volg/To Follow |
| 14 | <u>Skuldbewyse tov lenings aan oorledene verskuldig/Proof of debts owed to deceased</u>   | Ja/Yes Nee/No Volg/To Follow |
| 15 | <u>Kredietkaarte/Credit cards</u>   | Ja/Yes Nee/No Volg/To Follow |
| 16 | <u>Lewensversekeringspolis/Life assurance policies</u>  | Ja/Yes Nee/No Volg/To Follow |
| 17 | <u>Korttermynversekeringspolis/Short term insurance policies</u>  | Ja/Yes Nee/No Volg/To Follow |
| 18 | <u>Veilige bewaringsloketkwitansie/Safety deposit box receipt</u>   | Ja/Yes Nee/No Volg/To Follow |
| 19 | Ooreenkoms & jongste finansiële state tov vennootskappe, privaat maatskappye, beslote korporasies, ens./Partnership agreements, buy and sell agreements and latest financial statements iro partnerships, private companies and close corporations in which the deceased had an interest:<br>Verskaf besonderhede/Furnish details _____ | Ja/Yes Nee/No Volg/To Follow |
| 20 | <u>Besonderhede van staande oeste, versekering en reëlings mbt voortsetting van boerdery /</u><br>Details of unharvested crops, insurance and arrangements regarding the continuation of farming activities<br>Verskaf besonderhede / Furnish details _____   | Ja/Yes Nee/No Volg/To Follow |
| 21 | Het die oorledene enige beperkte regte gehad (bv vruggebruik, fidei commissum, Jaargelde, trustinkomste)?/Did the deceased enjoy any fiduciary rights (eg. usufruct, fidei commissum, trust income, annuities)?<br>Verskaf besonderhede/Furnish details _____   | Ja/Yes Nee/No Volg/To Follow |
| 22 | <u>Het die oorledene bates in die buiteland/Does the deceased own any foreign assets?</u><br>Verskaf besonderhede/Furnish details _____   | Ja/Yes Nee/No Volg/To Follow |
| 23 | <u>Bestaan daar korttermynversekering oor die boedelbates/Are the estate assets covered by short term insurance?</u>  | Ja/Yes Nee/No Volg/To Follow |

23.1 Indien wel, versekeraar/lf so, who is the insurer? \_\_\_\_\_

23.2 Polis no/policy numbers : \_\_\_\_\_

23.3 Moet Efficient Board of Executors bestaande versekering oorplaas op langsliewende se naam?  
Must Efficient Board of Executors transfer existing insurance into the name of the surviving spouse? Ja/Yes Nee/No Volg/To Follow

Indien nie, moet Efficient Board of Executors nuwe versekering reël?  
If not, must Efficient Board of Executors arrange for new insurance? Ja/Yes Nee/No Volg/To Follow

**C. DOKUMENTE & INLIGTING BENODIG MET BETREKKING TOT LASTE/DOCUMENTS & INFORMATION REQUIRED RELATING TO DEBTS**  
(Heg jongste state aan/Attach latest statement)

1. Naam/Name	Adres/Address	Rekening no/Account no	Bedrag/Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

2. Naam en adres van begrafnisondernemer/ Name and address of funeral undertaker : \_\_\_\_\_

3. Naam en adres van verbandhouer asook rekeningnommer  
Name and address of bondholder and account number: \_\_\_\_\_

4. Het die oorledene borgverpligtinge gehad /Did the deceased sign surety for any debts ? \_\_\_\_\_ Ja/Yes Nee/No  
Verskaf besonderhede / Furnish details

5. Bates verpand, sedeer of beswaar as sekuriteit vir verpligtinge/? \_\_\_\_\_ Ja/Yes Nee/No  
Assets pledged, ceded, mortgaged as security for indebtedness

BATE/ASSET	AAN WIE/TO WHOM	ADRES/ADDRESS
_____	_____	_____
_____	_____	_____
_____	_____	_____

**D. REËLINGS VIR ERFGENAME/ARRANGEMENTS ON BEHALF OF HEIRS**

1. Nuwe Testament/New Will \_\_\_\_\_ Ja/Yes Nee/No
2. Belegging van erfenis wanneer beskikbaar/Investment of inheritance when available \_\_\_\_\_ Ja/Yes Nee/No
3. Versekering van bates/Insurance of assets \_\_\_\_\_ Ja/Yes Nee/No
4. Inkomstebelastingadvies/Income tax advice \_\_\_\_\_ Ja/Yes Nee/No
5. Bestuur van beleggingsportefeulje/Management of investment portfolio \_\_\_\_\_ Ja/Yes Nee/No

**E. ANDER INLIGTING OF VERSOEKE/OTHER INFORMATION OR REQUESTS**

Enige ander inligting of versoeke wat u onder die aandag van die eksekuteur wil bring/Any other information or requests that you would like to bring to the attention of the executor.

Indien enige van die bates verkoop moet word, word die skriftelike toestemming van alle restanterfgename benodig. Gee besonderhede ten opsigte van enige bate (behalwe kontant) wat nie aan die erfgename oorgedra moet word nie (wyse van verkoop, verwagte prys)./If any assets must be sold, the written consent of all residual beneficiaries are required. Give details in respect of any assets (except cash) that must not be transferred to the beneficiaries (manner of sale, expected price).

\_\_\_\_\_  
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