



A.G. VAN BRAKEL & ASSOCIATES INC.
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This is the **THIRD** edition of our newsletter regarding **WILLS AND ESTATE PLANNING**.

Feel free to contact us should you require a copy of our first / second editions dealing with :

1. THE IMPORTANCE OF A VALID WILL

2. HOW TO PREVENT UNNECESSARY AND SOMETIMES CATASTROPHIC DELAYS

This edition deals specifically with matters to be dealt with regarding **WHAT MUST BE IN THAT SPECIAL ENVELOPE**.

You can reduce additional trauma and further heartache for your family by ensuring that the **SPECIAL ENVELOPE** is as comprehensive as possible.

Please feel free to contact us to ensure that you do not die without a valid will!!

You are more than welcome to share this newsletter with your family, friends and colleagues as it is imperative for every adult to have a valid will.

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Yours faithfully,

A.G. VAN BRAKEL
A.G. VAN BRAKEL & ASSOCIATES INC.

WHAT MUST BE IN THAT SPECIAL ENVELOPE?

IT IS HUMAN NATURE NOT TO THINK OF DEATH, PARTICULARLY YOUR OWN, BUT THIS IS A SAD REALITY THAT NOBODY CAN AVOID!

HEREWITH A PRACTICAL GUIDE WHICH WILL EASE THE CIRCUMSTANCES OF YOUR LOVED ONES AND NEXT-OF-KIN IN THE EVENT OF YOUR DEATH

- 1) A letter to your next-of-kin outlining your wishes regarding your funeral, particularly your wishes regarding burial or cremation
- 2) Copy of your will, specifying the location of your original will and providing contact details of your Executor / institution where the will is kept
- 3) A certified copy of your ID
- 4) Certified copies of all your family members, and as far as possible, ID's of the heirs.
- 5) Certified copy of any firearm licences, if applicable
- 6) Original or copy of your marriage certificate
- 7) Original or copy of your marriage contract
- 8) Original or copy of your divorce decree/s
- 9) Original or copy of your children / s birth certificates
- 10) Copies of any rental agreements on properties you own
- 11) Copies of any loan agreements
- 12) Income tax reference number as well as contact details of the person handling your tax affairs
- 13) Original or copy / ies of any title deeds on fixed property registered in your name
- 14) Particulars of any policies and other insurance related products
- 15) Copies of all bank / investment accounts in your name as well as all your credit cards
- 16) Particulars of any funeral policy / ies

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- 17) Particulars of any long term Investment Managers and Insurance Brokers, with their contact details
- 18) All vehicle registration documentation for vehicles registered in your name
- 19) Particulars of vehicle and household insurance policies
- 20) Medical aid details
- 21) Death certificate of your predeceased spouse
- 22) A list of contact details of your attorney, executor, trustees, bank manager, doctor, auditor, guardians of your children, employer and best friends etc.
- 23) Ensure that your attorney and executor have details of any foreign beneficiaries



IT IS ESSENTIAL THAT SOMEBODY CLOSE TO THE FAMILY IS AWARE OF THE WHEREABOUTS OF THIS ENVELOPE / FILE AS WELL AS THE ORIGINAL DOCUMENTATION, IN THE EVENT OF THE SIMULTANEOUS DEATH OF THE ENTIRE FAMILY!

WE ARE ABLE TO ASSIST YOU AT A NOMINAL FEE WITH THE INITIAL SETUP AND ANNUAL MAINTENANCE OF THIS ENVELOPE / FILE, AND WILL UPDATE IT IN THE EVENT OF ANY MATERIAL CHANGES.



PLEASE FEEL FREE TO CONTACT US FOR FURTHER INFORMATION ON HOW WE CAN ASSIST YOU IN THIS REGARD.

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