

GUARDIAN'S DETAILS

Full name/s

Relationship

Tel no

SPECIFIC INSTRUCTIONS

Do you wish to be cremated?

 YES NO

DETAILS OF EXECUTOR

Fedtrust (Pty) Ltd will be appointed Executor and Trustee

DETAILS OF CO-TRUSTEE (if required)

Full Name/s

Relationship

Tel no

BROKER DETAILS

Broker code

Surname

Full name/s

Company name

Cell no

Tel no (work)

Fax no

E-mail

Broker signature

VAT registration no

Date

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FEDTRUST BANK DETAILS

Cheques should be made payable to: **Fedtrust (Pty) Ltd**

Direct deposits may be made into:

BANK : Standard Bank
BRANCH : Sandton
BRANCH CODE : 01-92-05
ACCOUNT HOLDER : Fedtrust - Business
ACCOUNT NUMBER : 420 943 161

FEDTRUST DETAILS

Cape Town : 021 949 2100
Durban : 087 806 5513
Email : info@fedtrust.co.za
Johannesburg : 011 305 2302
Port Elizabeth : 041 363 3570
Internet : www.fedgroup.co.za

ASSETS

LIABILITIES

If the nett worth of your estate is worth more than R3.5 million consider booking an estate planning consultation and provide the information requested

FARMING ASSETS

TESTATOR TESTATRIX

Livestock		
Implements		
Farming vehicles		
Other		

FIXED PROPERTY

Residential		
Commercial		
Other		
Mineral rights held separately		

MOVEABLE ASSETS

Vehicles		
Firearms		
Furniture		
Other		

LIQUID ASSETS

Listed shares		
Unit trusts		
Bonds/Loans		
Cash investments		
Other		

Assurance payable to estate

BUSINESS INTERESTS

Shares in private company		
Loan account		
CC interests		
Loan account		
Partnership interests		
Loan account		
Sole proprietor		
Other loan account		

BUY & SELL AGREEMENT

YES NO

Loan account		
CC interests		
Loan account		
Partnership interests		
Loan account		
Sole proprietor		
Other loan account		

TOTAL ASSETS

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TOTAL LIABILITIES

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	TESTATOR	TESTATRIX
Vehicle finance		
Mortgage bonds		
Bank overdrafts		
Loans		
Creditors		
Income tax		
Suretyships		
Other		
Possible maintenance claim		