

# Settling the affairs of a departed loved one

## First consultation form



**Disclaimer:**  
The information contained in this guide is meant for use by clients of PH Attorneys only and is only intended to be used as a general guide and should therefore not be relied on as legal advice. As a guide it is also not intended to be comprehensive or cover all possible situations relating to the administration of a deceased estate. If in doubt, contact your attorney at PH Attorneys to confirm any position before any legal action is taken on the basis of this guide.

# First consultation form

Please go through the following First Consultation Form and complete as comprehensively as possible to submit to us before or during our first consultation with you.

## The deceased

Surname	
Full names	
Identity number	
Nationality	
Occupation	
Last known address	
Ordinary place of residence during 12 months before death	
Place of birth	
Date of death	
If married, place where married	
Income tax number	

# The surviving spouse (if any)

Surname	
Full names	
Identity number	
Nationality	
Indicate whether married In Community of Property and whether Accrual System is applicable	
Did the parties enter into a Customary Marriage?	

# General information

Name of pre-deceased / divorced spouse	
Date of death of pre-deceased spouse (if applicable)	
Master's Office where estate was reported and estate number (if applicable)	
Nationality	
Full names of children of deceased, including for each whether major, minor or pre-deceased	
Name and address of person who will sign the reporting documents as well as their relationship to the deceased	

# Assets of the deceased

## **Immovable Property:**

Provide street address, title deed description and municipal value for each property. If comprehensive a separate annexure can be provided.

## **Movable Property:**

List all movable property such as motor vehicles, furniture, jewellery, firearms, investments, shares etc. If comprehensive a separate annexure can be provided.

## **Claims:**

List all claims in favour of the estate such as bank accounts, insurance policies etc. If comprehensive a separate annexure can be provided.



# Setting the standard

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