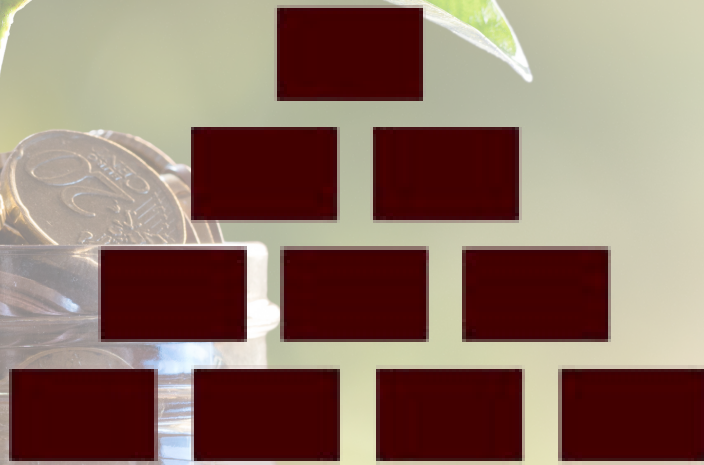


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Life File



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By Doing Things Differently***

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My intention of this "Life File" is to make life simpler for family, when I am no longer able to manage or speak for myself regarding my financial affairs.

PERSONAL DETAILS:

Full name: _____

ID number: _____

Essential friends, relatives, neighbours and colleagues to be contacted in the event of my death:

Name: Relationship to me: Contact Details: Tel / Email:

Where I have placed my final will and testament:

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DETAILS OF EXECUTOR: (INDIVIDUAL OR INSTITUTION NOMINATED TO CARRY OUT THE TERMS OF ONE'S WILL)

Name of person / Institution:

If person state ID number:

If Institution state Account / Ref number:

Email:

DETAILS OF ADMINISTRATORS OF TRUST:

Details of Trustees:

Institution:

Contact details:

FUNERAL DETAILS

Place of Worship:

Burial/Cremation and scattering of ashes Request:

Preferred Funeral Arrangements:

PAYMENT OPTIONS FOR FUNERAL

Burial Scheme / Funeral Policy:

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FINANCIAL DETAILS

Income tax Number: _____

Accountant's Details: _____

Email: _____

Contact number/s: _____



INSURANCE DETAILS ARE SHORT TERM SOURCES.



ASSURANCE DETAILS ARE LONG TERM SOURCES

Financial Workshop BANK ACCOUNTS, INSURANCE, INVESTMENTS, POLICIES, PENSION, UNIT TRUSTS, LOANS, SHARES, OFF SHORE ASSETS, ETC. *Gauteng cc*

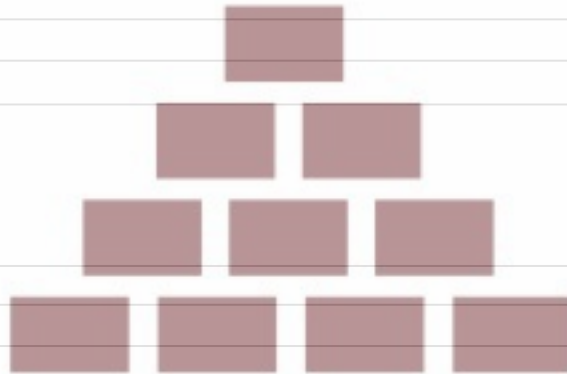
EMPLOYMENT AND INCOME SOURCES

Institution: 1

Account Number: _____

Account Type: _____

Contact Details: _____



Institution: 2

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Account Number: _____

Account Type: _____

Contact Details: _____

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BOND / LIFE ASSURANCE

Insurer:

Policy Number:

Email:

Contact Number:

INVESTMENTS

Insurer:

Policy/ Investent Number:

Email:

Contact Number:

INSURANCE

Insurer:

Policy Number:

Email:

Contact Number:

MEDICAL AID:

Name of Medical Aid:

Membership Number:

Contact Number:

OWNERSHIP DOCUMENTS / H/P / LEASE DETAILS FOR MOTOR VEHICLES:

RESIDENTIAL PRO

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Erf Number:

Title Deed in the Name of:

Bond Account Number:

Bond Registered with Bank: [Name]

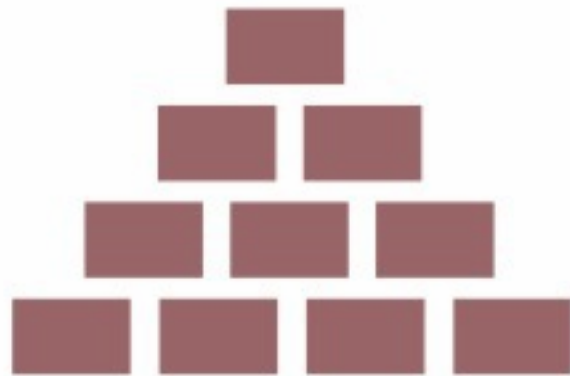
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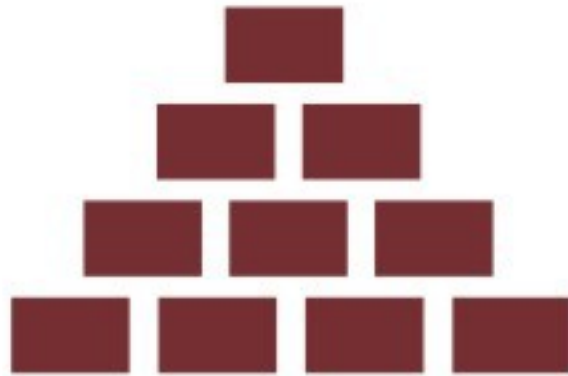
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Contact FWS for a full version of the 'Make Life Simple Life File'. Important details that make the life of your family easier and the navigation of your personal assets, documents and information, a simple solution.

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