

EWING

EXECUTIVE SERVICES

28 Old Main Road , Hillcrest, 3610, KwaZulu-Natal | PO Box 1, Hillcrest, 3650
 Tel: +27 31 765 5937 | Fax: +27 31 765 3687
 Email: iain@ewing.co.za | www.ewingtrust.co.za

OUR LAST WILL AND TESTAMENT INSTRUCTION SHEET

1.	Your full name:					
	Identity Number:					
2.	Residential Address:					
	Telephone No:	Home:	Work:	Cell:		
	Email Address:					
3.	Postal Address:					
4.	Marital Status:	Married	Single	Divorced	Widowed	(Circle whichever is applicable)
	Marriage by:	ANC	Accrual	In Community of Property	(Circle whichever is applicable)	
	4.1	Full names of spouse:				
	4.2	Spouse's Identity Number:				
	4.3	If divorced, state full name of previous spouse:				
	4.4	If widowed, state full name of deceased spouse				
		and date of death:				
5.	Children:					
	5.1	State full names, dates of birth and marital status (if applicable):				

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	5.2	State if any legally adopted children or children born of a different marriage:	
6.	Executors: 6.1 Name/s (relationship to you) 6.2 Ewing Tax Services. - Joint appointment?		Yes / No (Circle whichever is applicable)
7.	Trustees (if there is a Will Trust for minor beneficiaries):		
	Relationship to you:		
8.	Trust for minor beneficiaries until the age of: 21, 23, 25, 28 or 30 (Circle whichever is applicable)		
9.	Guardians for minor children:		
	9.1	Name and relationship:	
	9.2	Name and relationship:	
10.	Special Bequests/Gifts:		
	10.1	Name:	
		Details of bequest:	
	10.2	Name:	
		Details of bequest:	
	10.3	Name:	
		Details of bequest:	

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11.	Beneficiary/ies of the Residue/Balance of Estate:		
	11.1	Name and relationship:	
	11.2	Name and relationship:	
	11.3	Name and relationship:	
12.	Alternate beneficiary/ies, should the beneficiaries in 11 above fail:		
	12.1	Name and relationship:	
	12.2	Name and relationship:	
	12.3	Name and relationship:	
13.	Any preference as to burial/cremation:		
14.	Details of special directions regarding funeral:		
15.	Do you have any overseas assets?		
16.	Do you require a Living Will?		
17.	Do you require detailed Estate Planning? (eg possible estate duty)		

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Bank accounts _____

Assets _____

Unit Trust _____

Pension _____

Annuities _____

Offshore accounts: _____

Vehicles, caravans, boats, trailers: _____

House, bond account no. : _____

Firearms : _____

Insurance Policy: _____

Medical aid: _____

Pre-deceased spouse for claim of E/D: _____

Formal emigration by beneficiaries: _____

Details of beneficiaries : _____

Copy of Letters of Executorship (predeceased): _____