

# Estate Planning Checklist

A Guide by Tate Nolan & Knight

Losing a loved one is difficult; navigating the legalities shouldn't be.

Use this checklist to ensure your affairs are in order, protecting your family's future and your legacy.

## The Essentials (The Paper Trail)

- **A Valid Original Will:** Is it signed and witnessed correctly according to the Wills Act? (Remember: Witnesses cannot be beneficiaries).
- **Executorship:** Do you know where your nominated Executor's contact details are?
- **Identity Documents:** Copies of your ID, Birth certificates of minors, marriage certificates, ANC contract and any divorce orders.
- **Living Will:** If you have a Living Will, ensure that copies are handed to your Doctor & family.

## Financial & Asset Map

- **Bank Accounts:** A list of all accounts (cheque, savings, credit cards) and where to find the statements.
- **Title Deeds:** Proof of ownership for all immovable property (or bond account numbers).
- **Share Certificates:** Details of investments, stocks, or unit trusts.
- **Business Interests:** Buy-and-sell agreements or partnership contracts if you own a business.

## Policies & Protection

- **Life Insurance:** Policy numbers and contact details for the brokers.
- **Funeral Cover:** Policy number and contact details.
- **Retirement Funds:** Ensure your beneficiary nominations on your pension or RA are updated (these are governed by the Pension Funds Act, not your Will!).
- **Medical Aid:** Details of your plan and gap cover.

## The Digital Legacy

- **Digital Vault:** A secure list of passwords for smartphones, laptops, and social media accounts.
- **Crypto Assets:** Private keys or exchange login details for any cryptocurrency.
- **Subscription Services:** A list of recurring debits (Netflix, gym, apps) that will need to be cancelled.

## Final Wishes

- **Funeral Instructions:** Burial or cremation preferences (and details of any pre-paid funeral policies).
- **Organ Donation:** Clearly stated wishes or proof of registration with the Organ Donor Foundation.
- **Guardianship:** If you have minor children, have you officially nominated a guardian?



**Tate Nolan  
& Knight**

Book a consultation to update your Will today



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“Peace of mind isn't found in luck, it's found in a plan”