

LAST WILL AND TESTAMENT

Please complete the form and
e-mail to elizna.gouws@pkf.co.za

1 Definitions

- 1.1 Executor** The person who will Administer your Estate and will be responsible to report your Estate to the Master of the Supreme Court, and deal with your Estate in accordance with the Administration of Estates Act, Act 66 of 1965.
- 1.2 Co-Habiting** If you are not married but, in a relationship, and have been living together as partners.
- 1.3 Testator / Testatrix** The person making the will and signing the Will.
- 1.4 Minor** Means a person under the Age of 18.
- 1.5 Major** Means a person over the Age of 18.
- 1.6 Residue** Anything that you did not bequest specifically in your Will, will form part of the Residue of your Estate.
- 1.7 Beneficiary** Means a person who receives an inheritance from your Estate.
- 1.8 Heir** Means a person who receives an inheritance from your Estate.
- 1.9 Legatee** Means a person who receives a specific amount or gift;
- 1.10 Issue** Means a Descendant (child of the deceased);
- 1.11 Per Stirpes** Means that the amount bequeath to a certain person will devolve upon their issue/s, if they were to predecease you.
- 1.12 Per Capita** Means that the bequest to a certain person will devolve on the remaining mentioned people of an identified group in equal shares and not to the issue of that person.
- 1.13 Trustee** Means a person given control or powers to administer certain assets on behalf of a beneficiary for a certain period of time.
- 1.14 Bequest** Means to leave an asset or an amount to an Heir, Beneficiary or a Legatee.

2 Information from Testator / Testatrix

2.1 Full name

2.2 Surname

2.3 Identity Number

2.4 Address

2.5 E-mail Address

2.6 Title

Mr. Mrs. Ms. Dr. Adv. Rev.

2.7 Gender

Male Female

2.8 Marital Status

Married Unmarried Divorced
 Widow Co-Habiting

If you are Married, please complete numbers 2.9 – 2.10

2.9 How are you married:

Married in Community of Property

Married out of Community of Property without the Accrual

Married out of Community of Property with the Accrual

2.10 Name & Surname of Spouse

2.11 Identity Number of Spouse

3 Executor

If you select **PKF (PE) Inc.** to be your Executor or Co-Executor we will draft your Will for **FREE**.

We have an experienced team dealing with the Administration of Estates and will make sure that your beneficiaries' interest will be taken care of.

You can also select your own Co-Executor (Your spouse, child, brother or sister etc.) to act with PKF (PE) Inc. as Executors, if you would prefer a family member to be kept in the loop and co-sign with PKF(PE) Inc.

3.1 Do you want PKF (PE) Inc. to act as Executor Yes No

If No, please provide us with the following:

3.1.1 Name & Surname of Executor

3.1.2 Identity Number of Executor

3.1.3 Relationship with Executor

3.1.4 Contact Number

3.1.5 E-mail Address

3.2 Do you want a Co-Executor Yes No

If Yes, please provide us with the following:

3.2.1 Name & Surname of Co-Executor

3.2.2 Identity Number of Co-Executor

3.2.3 Relationship with Co-Executor

3.2.4 Contact Number

3.2.5 E-mail Address

Please just keep in mind if PKF (PE) Inc. is not appointed as the Executor or Co-Executor there will be a fee to draft the Will. We will make contact with you to discuss the fee before we draft your Will.

4 Bequest

4.1 Please provide us with the beneficiary’s name, surname and Identity number and indicate what you want to bequeath to each beneficiary. If you don’t have their ID numbers please indicate if they are minor or major.

Name	Surname	ID Number	Details of bequest

4.2 Please indicate what should happen to each bequest in the event that the person as stated in 4.1 predecease you or if you should die simultaneously. Please further indicate if it should devolve upon their issue or upon a specific person or should form part of the residue of the Estate:

4.3 Please indicate who will receive the residue of your estate and further indicate what will happen if this person were to predecease you or die simultaneously.

5 Will Trust

If you were to bequeath your Estate or a part thereof to a minor, you need to create a Will Trust for these beneficiaries to be paid out when they reach a certain age (over the age of 18). If you don't create a Will Trust their inheritance will be paid to the Guardians Fund.

The main purpose of the Will Trust is to take care of the maintenance and well-being of your Beneficiaries. The Trustees will have the discretion to make payments for the maintenance and well-being of the Beneficiaries whilst the beneficiaries are at school or busy with their studies.

It is also a great idea to establish a Will Trust in your will if one of your beneficiaries is handicapped to ensure that they are taken care of financially and the Trust can be terminated on either their death or once the whole Trust fund has been depleted.

5.1 Name of the Will Trust

5.2 Names, Surnames and Identity numbers of Trustees if you want anyone to be appointed other or together (please indicate other or together) with the Executors already mentioned:

Name and Surname of trustee	ID Number	Other / Together / The Executors		
		Other	Together	The Executors
		Other	Together	The Executors
		Other	Together	The Executors

5.3 Age on which the Trust can be distributed to the Beneficiaries of said Trust

5.4 If one or all of your beneficiaries predecease you or if you should die simultaneously or in the event that the beneficiary pass away before reaching the age as stated above, please indicate on who their portion shall devolve upon:

6 Guardian – Minor Children

If your child/ren are younger than 18, you need to appoint a guardian in the event that you and the child's father/mother pass away.

6.1 Name & Surname of the Guardian

6.2 Identity Number of Guardian

7 Last Wishes

7.1 Please inform us if you want to be cremated or buried and of any special instructions with regards to your remains:

KINDLY NOTE THAT THE INFORMATION PROVIDED WILL BE USED TO DRAFT YOUR WILL AND BY COMPLETING THE ABOVE FORM, YOU CONSENT TO US USING YOUR INFORMATION FOR THIS PURPOSE AS SET OUT IN PROTECTION OF INFORMATION ACT, ACT 4 OF 2013.

ONCE YOU HAVE COMPLETED THE FORM, WE WILL DO A DRAFT WILL AND SEND IT TO YOU FOR YOUR APPROVAL, WHEREAFTER WE WILL MAKE CONTACT WITH YOU WITH REGARDS TO THE SIGNING AND STORAGE OF YOUR WILL.

KINDLY NOTE THAT WE WILL STORE YOUR WILL FOR FREE UNTIL THE TIME OF DEATH OR ALTERNATIVELY AS INSTRUCTED BY YOU.

right people
right size
right solutions

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