

Name	
Date of Birth	
Date of Death	

INFORMATION/DOCUMENTATION TO BE OBTAINED	COMMENT
1. Original certified copy of death certificate	
2. Original certified copy of deceased's ID	
3. Original certified copy of all dependants and guardians ID's	
4. Birth certificates for children where ID is not available	
5. Death Notification Form (Administrators standard)	
6. Form A & D	
7. Marriage certificate	
8. Deceased's payslip for month of death and preceding month	
9. Dependants relationship with deceased	
10. Expression of Wish Form	
11. Proof of dependency for any major children and doubtful cases	
12. Extent of dependency of each dependant	
13. Appointed Guardian of minor children	
14. Appointed caregiver – obtain a certificate of appointment as a caregiver from the South African Social Security Services	
15. Address and Banking details of major dependants, spouse and guardians	
16. If no dependants, details of executor must be supplied	
17. Details of financial affairs of major dependants (such as salary slips and bank account)	
18. Indication of potential future earning capacity of dependants (a teacher, doctor etc)	
19. Affidavit from all guardians confirming minors benefit to be paid into a trust	
20. If the guardian indicates cash and the Trustees are doubtful whether to pay cash, then proof that the guardian is capable of managing the financial affairs of the minor	
21. Affidavit from major dependants stating that there are no other dependants	



DEPENDANTS:	All children Factual dependants
NOMINEES:	Any non-dependant entered on Expression of Wish Form
NB: A dependant and a nominee must be a natural person.	
PROOF OF DEPENDANCY:	Such as an affidavit by a relative or family friend, a birth certificate indicating parents, Membership of medical aid.
GUARDIAN:	The natural mother or father of any minor child or in their absence a responsible person appointed by the Trustees or by the state.
CAREGIVER:	A person responsible for minor children who has been appointed by the South African Social Security Services
EXTENT OF DEPENDANCY:	Dependant on housing, food, clothes, study and other relevant reasons. A minor child is for example 100% dependant for basic living expenses and schooling.
RELATIONSHIP:	Son, daughter, spouse, common law spouse, mother, father, friend etc
CAPABLE OF MANAGING THE FINANCIAL AFFAIRS	Not a declared prodigal, Estate sequestrated, under curatorship.

