

momentum corporate

When losing a loved one, the last thing the people who are left behind need is endless administration.

While we acknowledge that some administration is unavoidable, having all the required documents in one place should ease the heavy burden that falls on the bereaved.

Some notes to remember

- Keep the originals of these documents in your filing system, but following a death make sure you have copies of everything in one place, in one single file.
- You might like to write on the reverse of each document in which file they can be found in the filing system. If you update or renew any documents make sure they are dated and filed in your filling system.
- Do not give away any copies from your Smart Life file. If someone needs a copy, make one for them and refile your copy.
- Make sure you and your partner and one or two other people know where the Smart Life file is if one or both of you pass away.
- Use an app for storing pin numbers and passwords in a secure online vault that you can access via any computer with a master password.

Personal	Details
Original birth certificate, certified copy	
Original identity document, certified copy	
(front and back if you have a smart ID)	
Latest original passport, certified copy	
Driver's license, certified copy	
Firearm license, certified copy	
Last will and testament, latest version, signed, dated and	
witnessed and any special requests outside of the will and	
testament	
Organ donor certificate, living will, do not resuscitate order	
Funeral policy and details of the underwriter	
Funeral detail such as	
Memorial service / cremation details	
Funeral parlour details	
Special request e.g. spreading of ashes	
Power of attorney – download from the internet or have an	
attorney draw it up	
Separate power of attorney for your bank using their forms	
Proof of marriage / spouse / life partner	
Marriage certificate if registered at Home Affairs	
Affidavit signed by a commissioner of oath if a	
customary union, marriage under the tenets of	
any other religion or a permanent life partner	
Marriage / antenuptial contract	
Divorce, court order and agreement	
Details of pre-deceased spouse, full names and date of death	
Income tax	
Tax number	
Last assessment	
 VAT registration certificate (if registered) 	
Pension fund / provident fund / retirement annuity	
• Name	
Administrator or insurer	
Contact details	
Financial adviser details	
Additional benefits such as health premium waiver, that	
may continue to pay out for a period after the death of the member	
Copies of annuity policies	
Beneficiary nomination form for pension / provident /	
retirement annuity fund, group insurance cover and life insurance	
Short term insurance policy on property and motor vehicle/s	
• Insurer/s	
Policy number/s	
Contact details	
Financial adviser details	
Pet insurance and policies	

Assets	Details
Deeds and shareholdings	
Title and / or sectional title - immovable property	
Partnership agreements	
Detail of private companies	
 Trust deeds / letters of authority 	
Letting contracts	
Investments	
Share portfolio (listed)	
Unit trusts	
Life policies	
Education policies	
Any other investments	
 Overseas investments 	
Overseas bank account details	
Bank accounts	
Cheque account/s	
 Savings account/s 	
 Money market account/s 	
Credit card/s	
 Bank account numbers, pins, online passwords written down 'in code' or stored in an app 	
Trusts	
Any other documents / information relating to assets liabilities	

Contracts, accounts, etc.	Details
If under debt review / counselling, relevant contact details	
Employment contract / qualification certificates	
Bank statements and debit order details	
Personal loans: statements and agreements	
Other informal loans e.g. from friends or family	
Hire purchase lease agreements:	
Statements and agreements	
Rental income: full details	
Cell phone contract	
Clothing accounts	
Municipal account	
DSTV, Netflix, Showmax, etc.	
Telkom, Fibre, etc.	
Registration certificate/s for motor vehicle/s	
Medical aid, copy of policy condition	
Gap cover, copy of policy condition	
Gym contract	
Other memberships, contract/s or accounts	

General	Details
Beneficiaries of will	
Copy of identity documents, birth certificate if minor	
 Contact details of beneficiaries, address, telephone number, email address 	
Adoption certificate for any adopted children	
Contact details	
Accountant / bookkeeper	
Private banker	
• Lawyer	
• Other	

Social media	Details
Facebook	
Cell phone number or email address	
Password	
Legacy contact – under profile settings	
Instruction of what must happen to Facebook	
Twitter	
Username	
Password	
Instruction of what must happen to Twitter	
LinkedIn	
Email	
Password	
Instruction of what must happen to LinkedIn	
Instagram	
Username	
• Password	
Instruction of what must happen to Instagram	
Other	
Username	
• Password	
Instruction of what must happen	
Other	
Username	
• Password	
Instruction of what must happen	

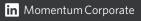
Passwords, pins (write in obvious code)	
Passwords or pins for:	
Home Wi-Fi	
Computer or laptop	
Cell phone	
Banking cards	
Alarm	
• Other	

Notes	

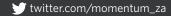
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