PERSONAL AFFAIRS ORGANISER

THE ROBERT GROUP
PRIVATE WEALTH

INTRODUCTION

As part of our commitment to helping you live fully in the present, while strategically crafting the future, we present this 'Personal Affairs Organiser'. This comprehensive document is not just a tool, but a pathway to ensuring your legacy - a lasting impression of your thoughtful preparation and love.

We understand that contemplating these matters can be challenging, yet they form an essential part of securing a harmonious transition of your personal affairs and estate. By providing this checklist, we aim to assist you in compiling all vital documents and information, thus paving the way for a peaceful transition, and allowing your loved ones to remember your legacy without administrative burdens.

As you navigate this preparation process, know that we are always available to provide any necessary support or clarification. We are here to make your journey in safeguarding the well-being of those you cherish most as smooth as possible, embodying our commitment to enabling you to seize the day, architect the future, and leave a lasting legacy.

No. 01 — **Personal Information and Contacts**

1. A list of important contact names and numbers that may be required in case of an emergency or death. (close family and friends, financial advisor, lawyers, doctor, insurance broker etc.)
2. Certified copies of birth certificates for every family member.
3. Certified copy of your marriage certificate, and it needs to be the unabridged version to support any claims.
4. Copy of your Antenuptial Contract.
5. Copy of any divorce agreements.
6. Certified copies of ID books/cards.
7. Certified copies of passports.
8. Certified copies of driver's licenses.
9. Certified copies of firearm licenses.

No. 02 — **Medical Information**

1. Copies of organ donor certificates/living wills.
2. Copies of DNRs (Do Not Resuscitate orders.)
3. Any important medical information or history for each family member.

No. 03 — **Legal Documents**

1. Power of attorney form for yourself and your partner.
2. Copy of wills.
3. Letter of wishes that contains any extra instructions from preferred funeral arrangements to who is to get specific belongings.
4. Certified copy of any death certificates.

No. 04 — **Insurance Policies**

1. List of life insurance policies.
2. List of house and car insurance policies.
3. Details of pet insurance and policies.
4. Medical aid policy.
5. Gap cover policy.

No. 05 — **Financial Information**

1. List of all bank accounts and credit and debit cards, and know how to access them.
2. List of debit orders and future-dated payments for each account, such as utility payments, insurance payments, medical aid payments, memberships etc.
3. Details of pensions.
4. Details of trusts.
5. List of investments.
6. Education policies for children.
7. Copies of the last/most recent tax assessment for each of you.
8. Know if you have credit card insurance.
9. Know if you have bond insurance.

No. 06 — **Property and Assets**

1. Copies of Natis documents for paid-up vehicles.
2. Any lease agreements you may have with service providers who you rent from eg. Cars and property.
3. Any lease agreements on property you may rent out.
4. Title deeds to properties owned.
5. Copies of utility documents must be no older than three months. Best practice is to put new ones into the What If File every month.

No. 07 — **Business Information (If applicable)**

If you are a business owner or shareholder (private company or close corporation), you will need copies of the following: CoR 14.1 Notice of Incorporation(company) / CK2 (CC), CoR 39 Directors of the company, Memorandum of Incorporation(company), Any shareholders/directors agreements if more than one shareholder/director, Latest Annual return certificate, Details of accountant/auditor and their contact details, Details of logins – accounting software/SARS efiling/CIPC/other, Details of bank accounts.

No. 08 — **Digital Assets and Online Accounts**

1. Pin numbers/passwords for cellphones.
2. Your master password for your digital password vault that contains all other passwords for online accounts and profiles, e.g. Banking, your website, education portals, utility services, subscriptions etc.
3. Facebook has an option under your Profile settings to add a Legacy Contact.
4. Copies of cellphone contracts and pin numbers for online access.
5. Make sure your family know how to access your computer.
6. Make sure you do the following regularly: Backup your cellphone regularly if it is not on automatic backup, and back up your laptop (make sure you include email, your address book, music and video files if they are important to you.)

As you close this chapter of preparation with the 'Personal Affairs Organiser', remember that you have made a profound step towards preserving your legacy for your loved ones.

But don't forget, this is just a fragment of the legacy-building journey. At TRG Private Wealth, we stand ready to walk with you through the comprehensive landscape of estate planning. Leaning on our years of experience and award-winning service, we aim to make this complex process effortless and reassuring for you. Let's connect today to continue writing your unique story - a narrative where you savor the present, intentionally shape the future, and weave an enduring legacy.