

2. SPOUSE / PARTNER DETAILS

Name
Middle Name
Surname
SA ID Number / Foreigners Date of Birth
Nationality
Home Telephone Number
Work Telephone Number
Mobile Telephone Number
Email Address

3. CHILDREN'S DETAILS

Name of Child 1
ID Number / Date of Birth
Contact Telephone Number
Email Address
Home Address

Name of Child 2
ID Number / Date of Birth
Contact Telephone Number
Email Address
Home Address

Name of Child 3
ID Number / Date of Birth
Contact Telephone Number
Email Address
Home Address

Name of Child 4
ID Number / Date of Birth
Contact Telephone Number
Email Address
Home Address

4. EMERGENCY CONTACT PERSONS / NEXT OF KIN

Name	Relationship	Telephone Number & Email Address

5. DETAILS OF DOMESTIC WORKER / GARDENER / NANNY

Name of Staff Member	Contact Number & Email Address

6. HOME SERVICES PROVIDER

Service Provider	Name & Company	Contact Number & Email Address
Electrician		
Plumber		
Home Alarm Technician		
Handy Man		

7. SECURITY INFORMATION

Armed Response Company
Contact Person(s) & Telephone Number
Home Alarm Code
Home Alarm Administrators Code
Home Alarm Password
Safety Deposit Box No. & Location
Home Safe Code & Location
Home Safe Key Location
Home Access Control Codes
Location of Spare Remote Controls

8. IMPORTANT CONTACT INFORMATION

	Company	Name	Telephone Number & Email Address
Attorney			
Accountant / Bookkeeper			
Financial Advisor			
Insurance Broker			
Doctor			
Medical Aid Broker			
Private Banker			

9. EMPLOYMENT INFORMATION

Company Name
Contact Person(s)
Contact Telephone Number
Employee Number

10. MEDICAL INFORMATION

Name of Medical Aid Company
Plan Option
Medical Aid Number
Online Username
Online Password
Blood Group
Organ Donor (Y/N)
Gap Cover Policy Number

11. PET INFORMATION

Pet Type
Pet Name(s)
Vet Name
Vet Contact Telephone Number
Pet Insurance Details

12. MOBILE PHONE INFORMATION

Phone Number 1
Pin Number
Phone IMEI (15 digit number)
PUK
Mobile Phone Contract Holder

Phone Number 2
Pin Number
Phone IMEI (15 digit number)
PUK
Mobile Phone Contract Holder

13. DIGITAL INFORMATION

Platform	Username	Password
Laptop		
Table / Ipad		
Facebook		
Twitter		
Instagram		
Pinterest		
Cloud Services		
STBB Evault		
Other		

14. LIST OF ACCOUNTS AND SUBSCRIPTIONS

Detail	Company Name	Account / Ref #
Internet Service Provider		
Fibre Service Provider		
DSTV		
TV Licence Number		
Netflix		
Showmax Etc.		
Landline Telephone Number	Eg: Telkom	
Retailer Account (Eg: Woolworths)		
Subscriptions / Debit Orders		
Subscriptions / Debit Orders		
Other		

15. FINANCIAL INFORMATION

Details	Company & Contract Name	Telephone / Email	Policy / Ref No.
Life Cover			
Funeral Cover			
Household Insurance			
Personal Loan			
Pension Fund			
Provident Fund			
Annuity			
Discretionary Investments			
Offshore Investments			
Shares			
Other			

16. BANK ACCOUNT INFORMATION

Name of Bank
Account Holder Name
Account Type
Account Number
Online Details
Username
Password

Name of Bank
Account Holder Name
Account Type
Account Number
Online Details
Username
Password

Name of Bank
Account Holder Name
Account Type
Online Details
Username
Password

17. IMMOVABLE PROPERTIES

Address	Erf No.	Homeloan Bank & Account No / Title Deed Held By

18. MOTOR VEHICLE(S)

Motor Vehicle 1
Description
Make & Model
Registration Number
Vin Number
Location of Vehicle
Vehicle License Due Date
Registration Papers held by
Service Book location
Vehicle Financed By
Company:
Contact Number:
Reference Number:
Vehicle Insurance
Company:
Contact Number:
Reference Number
Motor Vehicle 2
Description
Make & Model
Registration Number
Vin Number
Location of Vehicle
Vehicle License Due Date
Registration Papers held by
Service Book location
Vehicle Financed by
Company
Contact Number
Contract Number
Vehicle Insurance
Company :
Contact Number:
Reference Number:
Car Keys and Spares held at
Garage Remotes held at

19. FIREARMS:

Make and Serial Number
License Safekeeping Address
Ammunition Safekeeping Address & Contact Name

20. OTHER MOVABLE ASSETS, VALUABLES, COLLECTIONS, JEWELLERY, ETC.

Description	Safekeeping Address & Contact Info

21. INTEREST IN COMPANIES / CLOSE CORPORATIONS / TRUST

Name & Registration No. of Legal Entity 1
Contact Person Name and Details
Type of Interest (Director, Member, Trustee, Shareholder, Beneficiary)

Name & Registration No. of Legal Entity 2
Contact Person Name and Details
Type of Interest (Director, Member, Trustee, Shareholder, Beneficiary)

Due to the sensitive nature of this information:

- Store your completed checklist and supporting documents in your secure STBB eVault
- Allow STBB to hold your original will and property title deeds
- Remember to advise your next-of-kin where your original documents are held in safekeeping

For assistance, contact us at

E: estates@stbb.co.za | T: **021 673 4700**

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