

## WILL APPLICATION FORM

### OFFICE USE ONLY:

Please complete this form in block letters.

Fedgroup consultant name

Will number

Instruction (tick where applicable)

☐ NEW OR ☐ UPDATE OR ☐ SINGLE OR ☐ JOINT

### 1A. YOUR DETAILS:

Title

Initials

Surname

Full name/s

ID or passport number

Gender

☐ M ☐ F

### 1B. YOUR PARTNER'S DETAILS:

Title

Initials

Surname

Full name/s

ID or passport number

Gender

☐ M ☐ F

### 1C. YOUR ADDRESS:

Physical address

Code

Postal address

Code

Email where your Will may be sent to

Contact number

## 2. YOUR MARITAL STATUS (TICK ONE OR MORE OF THE FOLLOWING):

- ☐ SINGLE
 ☐ WIDOWED
 ☐ DIVORCED\*
- ☐ MARRIED\*\*
 ☐ IN COMMUNITY OF PROPERTY
 ☐ OUT OF COMMUNITY OF PROPERTY
- ☐ FOREIGN LAW Which country?
- ☐ OTHER Please specify:

If out of community of property:

- ☐ WITH ACCRUAL
 ☐ WITHOUT ACCRUAL
- ☐ CUSTOMARY

\* Please attach a copy of divorce order | \*\* Please attach a copy of marriage certificate and antenuptial contract or partnership agreement.

## 3A. INSTRUCTION IF YOU DIE FIRST:

Special requests

Residue

## 3B. INSTRUCTION IF YOUR PARTNER DIES FIRST (BEFORE YOU):

Special requests

Residue

3C. INSTRUCTIONS IF YOU BOTH DIE TOGETHER:

4. BENEFICIARIES (COMPLETE THE BELOW BLOCKS OR ATTACH COPIES OF IDENTITY DOCUMENTS OR BIRTH CERTIFICATES):

1.

Title

Initials

Surname

Full name/s

ID or passport number

Gender

Contact number

Relationship  
(to applicant)

2.

Title

Initials

Surname

Full name/s

ID or passport number

Gender

Contact number

Relationship  
(to applicant)

3.

Title

Initials

Surname

Full name/s

ID or passport number

Gender

Contact number

Relationship  
(to applicant)

## 5. INSTRUCTIONS IF ALL OF THE ABOVE DIE TOGETHER


**6. MINOR INHERITANCE (IF THE BENEFICIARY IS UNDER THE AGE OF 18):**

Who is the appointed guardian?

□ □ □ □

□ □ □

[illegible][illegible][illegible]

M F

[illegible][illegible][illegible]

\_\_\_\_\_

## 7. SPECIFIC INSTRUCTIONS:

Do you wish to be ☐ CREMATED or ☐ BURIED

## 8. DETAILS OF EXECUTOR OR TRUSTEE:

Fedgroup Trust Administrators (Pty) Ltd will be appointed executor and trustee. Y | N

Please specify a different name, if you answered no.

\* If Fedgroup will not be the executor please take note of the wills drafting fee on the attached Fiduciary Services Fee Structure on page 7 of this form.

9. OTHER:

Do you want a living Will? (I do not want to be kept alive by machines) ☒ Y ☐ N

Are you or your partner illiterate or visually impaired? Y N

Who is to be given access to digital assets (e.g. photos, movies, social media accounts), excluding bank accounts?

## 10. ADDITIONAL COMMENTS:


## 11. FINANCIAL PLANNER DETAILS:

Title	Initials	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name/s		
<input type="text"/>		
Company		
<input type="text"/>		
Financial planner code	FAIS licence number	
<input type="text"/>	<input type="text"/>	
Name of accountholder		
<input type="text"/>		
Name of bank	Account number	
<input type="text"/>	<input type="text"/>	
Account type	Branch name	
<input type="text"/>	<input type="text"/>	
Branch code		
<input type="text"/>		

FINANCIAL PLANNER'S SIGNATURE

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

### 13. CLIENT DECLARATION

1. I confirm that Fedgroup may communicate with and provide a copy of my Will to my financial planner, in accordance with the details set out in Section 11.
2. I confirm that Fedgroup may communicate with me through electronic means and I confirm that I can be contacted by email at the address provided.

#### POPI DECLARATION:

1. I/we acknowledge that any personal information supplied to Fedgroup is provided voluntarily and that Fedgroup may not be able to comply with its obligations if the correct personal information is not supplied.
2. I/we understand that privacy is important to Fedgroup and that they will use reasonable efforts in order to ensure that any personal information in their possession or processed on their behalf is kept confidential, stored in a secure manner and processed in terms of South African law and/or applicable Data Protection Legislation, for the purposes I/we have authorised.
3. I/we warrant that all information, including personal information, supplied to the Company is accurate and current, and agree to correct and update such information when necessary.
4. By submitting any personal information to Fedgroup in any form, I/we acknowledge that such conduct constitutes a reasonable, unconditional, specific and voluntary consent to the processing of such personal information by Fedgroup with third parties or suppliers for purposes of fulfilling its obligations and other legitimate purposes
5. Personal information may be retained by Fedgroup and for as long as it is necessary to fulfil its obligations as set out in this contract or policy, unless:
  - retention of the record is required or authorised by law; or
  - I/we have consented to the retention of the record.
6. I/we hereby authorise Fedgroup to collect and process my/our personal information and conduct background screening checks including, but not limited to, fraud prevention or detection, ID verification and bank account verification.
7. You warrant that when you give us personal information about your dependents, beneficiaries or spouse, you have received their permission to share their personal information with us. You understand that when you include your spouse, beneficiary/beneficiaries and/or dependents on your application form, we will process their personal information for the purpose of fulfilling our obligations and to pursue their legitimate interest.
8. I confirm that I am a competent person and that I have the authority to give consent on behalf of a person under the age of 18 (a minor or child).
9. Personal information may be transferred cross-border to countries, which do not necessarily have data-protection laws similar to South Africa, for verification or storage purposes. In any cross-border transfer of personal information the recipient will be notified of the need to protect the confidentiality of the personal information.
10. I/we take note that if Fedgroup has utilised the personal information contrary to the privacy and information protection conditions, I/we may first resolve any concerns with Fedgroup. If I/we am/ are not satisfied with such process, I/we have the right to lodge a complaint with the Information Regulator.
11. A copy of personal information held by Fedgroup will be furnished to me/us upon request in terms of the provisions of the Protection of Personal information Act (POPIA) or Promotion of Access to Personal information Act (PAIA) and I/we understand that I/we may dispute any information in the record provided.
12. I/we unconditionally agree to indemnify Fedgroup and its suppliers, acting in good faith in taking reasonable steps to process my/our personal information lawfully, against any liability that may result from the processing of my/our personal information. This includes unintentional disclosures of such personal information to, or access by unauthorised persons, and/or any reliance which may inadvertently be placed on inaccurate, misleading, or outdated personal information, provided to Fedgroup by myself/us or by a third party on my/our behalf.

Keep me updated about your products and services ☐ Y ☐ N

CLIENT'S SIGNATURE

Date

## 12. ASSETS AND LIABILITIES LIST:

If the net worth of your estate is worth more than R3.5 million, consider booking an estate planning consultation and provide the information requested.

	APPLICANT 1	APPLICANT 2		APPLICANT 1	APPLICANT 2
<b>FARMING ASSETS</b>					
Livestock			Vehicle finance		
Implements			Mortgage bonds		
Farming vehicles			Bank overdrafts		
Other			Loans		
<b>FIXED PROPERTY</b>			Creditors		
Residential			Income tax		
Commercial			Sureties		
Other			Other		
Mineral rights held separately			Possible maintenance claim		
<b>MOVEABLE ASSETS</b>					
Vehicle					
Firearms <sup>1</sup>					
Furniture					
Other					
<b>LIQUID ASSETS</b>					
Listed shares					
Unit trusts					
Bonds/loans					
Cash investments					
Other					
Assurance payable					
<b>BUSINESS INTERESTS</b>					
Shares in private company					
Loan account					
Sole proprietor					
Other loan account					
<b>BUY-AND-SELL AGREEMENT</b>					
Loan account					
CC interests					
Loan account					
Partnership interests					
Sole proprietor					
Other loan account					
<b>INTER VIVOS</b>					
Loan account					
<b>IS THIS WILL APPLICABLE TO RSA assets only?</b>					
<b>TOTAL ASSETS</b>			<b>TOTAL LIABILITIES</b>		

**1. Details of firearm(s) must be specified as to who will inherit to enable SAPS to allow the firearm(s) to be kept by the heir.**

A farm property may only be owned by one person. If more than one heir is required, ask for additional clauses.

## FIDUCIARY SERVICES FEE STRUCTURE

All values are reflected as **including VAT @ 15%**

<b>WILLS</b>	<b>FEDGROUP THE EXECUTOR</b>	<b>FEDGROUP NOT THE EXECUTOR</b>
Drafting single/mirror wills	R 517.50	R 1 150.00
Living will	No charge	N/A
Safe custody	No charge	N/A
Clients with Fedgroup product	No charge	R 1 150

<b>TRUSTS</b> Inter Vivos Trusts	<b>FEDGROUP TRUSTEE AND ADMINISTRATOR</b>	<b>FEDGROUP AD-HOC SERVICES</b>
Drafting Trust Deed & preparing documents	R 6 900.00	R 6 900.00
Management fee	1.15% to 1.72% depending on complexity	N/A
Minimum fee	R 4 600.00	N/A
Financials	Included	N/A
Tax	Included	N/A
Termination fee	Included	N/A

<b>TESTAMENTARY TRUSTS</b>	<b>FEDGROUP TRUSTEE AND ADMINISTRATOR</b>
Management Fee	1.15% to 1.72% depending on complexity
Capital Dissolution Fee	2,30%
Tax	Included

<b>SETTLEMENT TRUSTS</b> (ROAD ACCIDENT FUND AND MEDICAL NEGLIGENCE)	<b>FEDGROUP AS TRUSTEE</b>
Acceptance & Registration	R4 025.00
Administration & Tax	1.72% p.a
Court Bond premium	0.69% p.a
Termination fee	N/A

<b>ESTATES</b>	<b>FEDGROUP THE EXECUTOR</b>	<b>FEDGROUP NOT THE EXECUTOR</b>
Executor's fee (government tariff)	4.02% of gross Estate assets	4.02% of gross estate assets
	6.9% on income post death	6.9% on income post death
Loyalty discount offered	For every 5 years (unbroken) the Will is held by Fedgroup, a 2.5% discounts offered off the full Executor's fees	- - -
Postages and petties (as per Master's directive)	R 260	R 260
Minimum asset estate value @ R250 000	R 10 062.50	R 10 062.50

Fees applicable as at 1 September 2018.