



# ESTATES TRUST SERVICES

## WILL APPLICATION FORM FOR

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(NAME OF CLIENT)

### Will Introducer

Please give us your details so that we may contact you if there are any queries at a later stage:

First Name and Surname	
Company	
Work Telephone No.	
Fax No.	
Cell No.	
Email	
Postal Address	

May we contact the client directly for any queries that may arise?	Yes	No
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What language would you like the Will to be drafted in:	English	Afrikaans
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**Fritz Volker - CFP**  
Suite 2, 27 Jan Hofmeyr Road, Westville, 3631  
P O Box 1086, Wandsbeck 3631  
Tel (031) 266 8858  
Fax (031) 267 1481  
e-mail: [wills@volker.co.za](mailto:wills@volker.co.za)

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## PERSONAL PARTICULARS

	Testator	Testatrix
<b>Surname</b>		
<b>Title</b>		
<b>Full names</b>		
<b>Identity number</b>		
<b>Date of birth</b>		

Contact details	
<b>Residential address</b>	
<b>Postal address</b>	

<b>Telephone number - Work</b>		
<b>Telephone number - Home</b>		
<b>Cellular telephone number</b>		
<b>E-mail address</b>		

Marital status details		
<b>Marital status (Mark correct block)</b>	<i>By antenuptial - no accrual</i>	<i>By Antenuptial - with accrual</i>
	<i>In community of property</i>	<i>By British Law</i>
	<i>Single</i>	<i>Divorced/widow/widower</i>
	<i>Life Partner</i>	<i>Date of marriage</i>

Children of current marriage	Name	Date of birth

Children of previous marriage	Testator		Testatrix	
	Name	Date of birth	Name	Date of birth

Other financial dependants	Name	Date of birth



## Trust Provisions

In the event of a beneficiary being a minor, should a trust be considered and, if so, until what age of the beneficiary? (if no trust has been created, any funds accruing to a minor beneficiary must be paid to the Guardians Fund of the Master of the High Court until the beneficiary turns eighteen).

Trust to be Created	Yes	No
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Age at Termination of Trust	18	21	25	Other	
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## Testator

Cremation	Yes	No
Burial	Yes	No
Organ donation	Yes	No

## Testatrix

Cremation	Yes	No
Burial	Yes	No
Organ donation	Yes	No

Name/s of guardian/s and relationship to Testator/Testatrix.

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Assets	Value
Immovable property	
Movable property, i.e. furniture, cars, boats, firearms, etc.	
Investments, i.e. unit trusts, fixed deposits, etc.	
Policies - death benefit (payable to:)	
Business Interests	
<b>Liabilities</b>	<b>Value</b>

I hereby consent to a Deed/Company Search to be conducted.

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(Client's Signature)