



**WILL APPLICATION FORM**

Date: \_\_\_\_\_

Client : \_\_\_\_\_

**NOTE:**

This application form has been designed to enable A G Jenkins Attorneys to prepare a will, which will be as practicable as possible taking into account the financial position of the applicant and spouse (if any), the nature of the estate, the instructions which are given and the wishes of the applicant

**1. DETAILS OF APPLICANT**

Surname ..... Mr/Mrs/Miss/Other .....

First Names .....

Postal Address .....

..... Postal code : .....

Physical Address .....

..... Postal code : .....

Email Address .....

Telephone (h) ..... (w) ..... (cell) .....

Occupation .....

Date of birth ..... Identity number .....

Income tax ref no. .... Accountant or tax advisor .....

Marital Status: Unmarried ..... Widow/er ..... Divorced .....

Married ..... In COP ..... Out of COP .....

ANC ..... with accrual ..... without accrual .....

Accrual starting values self ..... spouse .....

ANC donations? .....

---

Telephone:	033 386 2509 / 033 386 2861	Hilton Office:	Suite 3, 24 Hilton Avenue
Fax:	08605278936		Hilton
E-Mail:	mail@agjenkins.co.za		3245
Web:	www.agjenkins.co.za	Gillitts Office:	9A Gillitts Office Park
Cell:	083 628 1401		2 Roger Place, Gillitts, 3610
Postal Address:	Postnet Suite 285, P Bag X6, Cascades, 3202		

Married Woman Maiden name : .....

Previous surname : .....

Occupation : .....

Business address : .....

..... Postal code : .....

**2. DETAILS OF SPOUSE**

Surname ..... Mr/Mrs/Miss/Other .....

First Names .....

Postal Address .....

..... Postal code : .....

Physical Address .....

..... Postal code : .....

Email Address .....

Telephone (h) ..... (w) ..... (cell) .....

Occupation .....

Date of birth ..... Identity number .....

Income tax ref no. .... Accountant or tax advisor .....

Business address : .....

..... Postal code : .....

**3. DETAILS OF CHILDREN**

NAMES	AGE	MALE	FEMALE	GRANDCHILDREN

#### 4. THE APPOINTMENT OF GUARDIANS FOR MINOR CHILDREN

While there is no necessity to nominate a guardian for minor children on the death of both parents (an Executor acting in consultation with the family and friends, may, if need be, take steps to have one appointed), it is probably simpler and more practical in most cases for a guardian to be nominated in the Will itself.

Guardian/s to be nominated                                         YES         .....                                         NO         .....

If "yes" state full name/s and relationship to applicant.

.....

.....

.....

.....

#### 5. DEATH BENEFITS NOT PAYABLE TO ESTATE

Broker's Details         .....

(eg Proceeds of life policy taken out in favour of spouse or where a person has been specifically nominated as a beneficiary) :

INSURANCE POLICIES / PENSION / BENEFITS / OTHER	PAYABLE TO	AMOUNT (R)

**6. FINANCIAL DETAILS : Nature and estimated value of assets**

		SELF	SPOUSE
<b>IMMOVABLE PROPERTY</b>			
Residential			
Business			
Agricultural			
Sectional			
Other			
<b>MOVABLE PROPERTY</b>			
Household effects			
Jewellery			
Vehicles			
Caravan			
Trailer			
Boat			
Other			
<b>SHARES, STOCKS, DEBENTURES</b>			
Quoted Companies			
Private Companies			
Close Corporations			
<b>INVESTMENTS</b>			
Investment Portfolios			
Savings Accounts			
Fixed Deposits			
Money Market			
<b>TOTAL CARRIED FORWARD</b>			

<b>TOTAL BROUGHT FORWARD</b>			
Unit Trusts			
Offshore Investments			
Loan/s			
Other			
<b>CLAIMS ARISING ON DEATH PAYABLE TO ESTATE</b>			
Insurance (excluding policies not payable to the estate)			
Pension Fund			
Provident Fund			
Other			
<b>TOTAL GROSS VALUE OF ESTATE</b>			
		R	R
<b>LESS LIABILITIES</b>			
Mortgage Bonds			
Credit Agreements			
Loans on policies			
Pledges / overdraft			
General creditors			
<b>GROSS VALUE OF ESTATE</b>			
<b>LESS INSURANCE HELD SPECIFICALLY TO COVER LIABILITIES</b>			
<b>(A) TOTAL LIABILITIES</b>		R	R
<b>(B) NET VALUE</b>		R	R

**7. SPECIFIC INSTRUCTIONS – please indicate full names**

- 7.1 Executors .....
- 7.2 Trustees .....
- 7.3 If spouse survives testator
  - 7.3.1 Household effects .....
  - 7.3.2 Special bequests .....
  - 7.3.3 (Trust for the benefit of) .....
  - 7.3.4 Residue .....
- 7.4 If spouse predeceased testator
  - 7.4.1 Household effects .....
  - 7.4.2 Special bequests .....
  - 7.4.3 (Trust for the benefit of) .....
  - 7.4.4 Residue .....
- 7.5 General Bequest Provisions
  - 7.5.1 Beneficiary predecease testator .....
  - 7.5.2 Trust for beneficiary under ..... years
  - 7.5.3 Handing a bequest to guardian .....
- 7.6 Trusts
  - 7.6.1 Income beneficiary .....
  - 7.6.2 Capital beneficiary .....
  - 7.6.3 Termination .....
- 7.7 Cremation Yes ..... No .....
- Cremation details .....
- .....
- .....

7.8 Letter of Wishes Yes ..... No .....

Details .....

.....

.....

.....

.....

.....

.....

7.9 Special instructions .....

.....

.....

.....

.....

.....

.....

.....  
TESTATOR / TESTATRIX

.....  
DATE



Fiduciary Lawyers and Conveyancers  
– Wills and Trusts, Estate Planning and Administration –

Telephone: 033 386 2509 / 033 386 2861  
 Fax: 086 527 8936  
 E-Mail: mail@agjenkins.co.za  
 Web: www.agjenkins.co.za  
 Cell: 083 628 1401  
 Postal Address: Postnet Suite 285, P Bag X6,  
 Cascades, 3202

Hilton Office: Suite 3, 24 Hilton Avenue  
 Hilton  
 3245  
 Gillitts Office: 9A Gillitts Office Park  
 2 Roger Place, Gillitts, 3610

Principal Attorney:	Anthony Jenkins	<a href="mailto:ant@agjenkins.co.za">ant@agjenkins.co.za</a>
Attorney:	Lorna Govender	<a href="mailto:lorna@agjenkins.co.za">lorna@agjenkins.co.za</a>
Attorney:	Caitlin Askew	<a href="mailto:caitlin@agjenkins.co.za">caitlin@agjenkins.co.za</a>
Attorney:	Verona Padayachee	<a href="mailto:verona@agjenkins.co.za">verona@agjenkins.co.za</a>
Candidate Attorney	Yasmin Mea	<a href="mailto:estates@agjenkins.co.za">estates@agjenkins.co.za</a>
Candidate Attorney	Dirk Oellermann	<a href="mailto:dirk@agjenkins.co.za">dirk@agjenkins.co.za</a>
Estates and Trusts Paralegal:	Nikita Naidoo	<a href="mailto:nikita@agjenkins.co.za">nikita@agjenkins.co.za</a>