

## 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 bequests

Residue

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

Special bequests

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
<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name/s		
<input type="text"/>		
ID or passport number	Gender	Contact number
<input type="text"/>	<input type="text" value="M"/> <input type="text" value="F"/>	<input type="text"/>
Relationship (to applicant)		
<input type="text"/>		

**2.**

Title	Initials	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name/s		
<input type="text"/>		
ID or passport number	Gender	Contact number
<input type="text"/>	<input type="text" value="M"/> <input type="text" value="F"/>	<input type="text"/>
Relationship (to applicant)		
<input type="text"/>		

**3.**

Title	Initials	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name/s		
<input type="text"/>		
ID or passport number	Gender	Contact number
<input type="text"/>	<input type="text" value="M"/> <input type="text" value="F"/>	<input type="text"/>
Relationship (to applicant)		
<input type="text"/>		

### 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?

Title	Initials	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name/s		
<input type="text"/>		
ID or passport number	Gender	Contact number
<input type="text"/>	<input type="text"/> M <input type="text"/> F	<input type="text"/>
Relationship (to applicant)	<input type="text"/>	
Email	<input type="text"/>	
Trust terminates at age:	<input type="text"/>	

### 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

D	D	M	M	Y	Y	Y	Y
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### 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	<input type="text"/>	<input type="text"/>	Vehicle finance	<input type="text"/>	<input type="text"/>
Implements	<input type="text"/>	<input type="text"/>	Mortgage bonds	<input type="text"/>	<input type="text"/>
Farming vehicles	<input type="text"/>	<input type="text"/>	Bank overdrafts	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>	Loans	<input type="text"/>	<input type="text"/>
<b>FIXED PROPERTY</b>					
Residential	<input type="text"/>	<input type="text"/>	Creditors	<input type="text"/>	<input type="text"/>
Commercial	<input type="text"/>	<input type="text"/>	Income tax	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>	Sureties	<input type="text"/>	<input type="text"/>
Mineral rights held separately	<input type="text"/>	<input type="text"/>	Other	<input type="text"/>	<input type="text"/>
<b>MOVEABLE ASSETS</b>					
Vehicle	<input type="text"/>	<input type="text"/>	Possible maintenance claim	<input type="text"/>	<input type="text"/>
Firearms <sup>1</sup>	<input type="text"/>	<input type="text"/>	<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.</b>		
Furniture	<input type="text"/>	<input type="text"/>	A farm property may only be owned by one person. If more than one heir is required, ask for additional clauses.		
Other	<input type="text"/>	<input type="text"/>			
<b>LIQUID ASSETS</b>					
Listed shares	<input type="text"/>	<input type="text"/>			
Unit trusts	<input type="text"/>	<input type="text"/>			
Bonds/loans	<input type="text"/>	<input type="text"/>			
Cash investments	<input type="text"/>	<input type="text"/>			
Other	<input type="text"/>	<input type="text"/>			
Assurance payable	<input type="text"/>	<input type="text"/>			
<b>BUSINESS INTERESTS</b>					
Shares in private company	<input type="text"/>	<input type="text"/>			
Loan account	<input type="text"/>	<input type="text"/>			
Sole proprietor	<input type="text"/>	<input type="text"/>			
Other loan account	<input type="text"/>	<input type="text"/>			
<b>BUY-AND-SELL AGREEMENT</b>					
Loan account	<input type="text"/>	<input type="text"/>			
CC interests	<input type="text"/>	<input type="text"/>			
Loan account	<input type="text"/>	<input type="text"/>			
Partnership interests	<input type="text"/>	<input type="text"/>			
Sole proprietor	<input type="text"/>	<input type="text"/>			
Other loan account	<input type="text"/>	<input type="text"/>			
<b>INTER VIVOS</b>					
Loan account	<input type="text"/>	<input type="text"/>			
<b>IS THIS WILL APPLICABLE TO RSA assets only?</b>				<input type="text"/>	<input type="text"/>
<b>TOTAL ASSETS</b>	<input type="text"/>	<input type="text"/>	<b>TOTAL LIABILITIES</b>	<input type="text"/>	<input type="text"/>

## 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 (ROAD ACCIDENT FUND AND MEDICAL NEGLIGENCE)</b>	<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.