

Estate planning *questionnaire*

Tell us about yourself, your family and what you own, and we will come back to you with a written estate plan proposal: what your will should say, whether a trust makes sense, how to keep estate duty, CGT and executor's fees down, and a fixed fee. It takes about fifteen minutes. Leave anything that doesn't apply blank — we will fill the gaps in a short call.

Type directly into this form (or print it and complete in ink). Tick the box that applies. Fields marked * are required. Save it and return it by email to office@lawvero.co.za together with the documents listed in section H, or bring it to your consultation.

A Your details

So we know who we are planning for and how to come back to you.

Full names and surname (as on your ID) *

South African ID number (or passport number and country) *

Date of birth

Email address *

Contact number *

Preferred way to be contacted

☐ Email ☐ Phone call ☐ WhatsApp

Residential address

Occupation

Are you a South African tax resident?

☐ Yes ☐ No — tax resident elsewhere
☐ Not sure

Do you hold citizenship or residency of any other country?

B Marriage and family

Your marital regime decides what is actually yours to leave, so this section matters more than it looks.

Worth knowing. If you are married in community of property, only your half of the joint estate passes under your will. If you are married with the accrual system, your spouse may have a claim against your estate before anything is distributed. We check the regime before drafting.

Marital status *

- | | |
|--|---------------------------------|
| ☐ Single — never married | ☐ Married |
| ☐ Life partner (not married) | ☐ Divorced |
| ☐ Widowed | ☐ Separated |

If married, under which regime?

- ☐ In community of property
 ☐ Out of community — without accrual
 ☐ Civil union
 ☐ Not sure
- ☐ Out of community — with accrual
 ☐ Customary marriage
 ☐ Married under foreign law

Date and place of marriage

Do you have a copy of your antenuptial contract?

- ☐ Yes — I can send it
 ☐ No
- ☐ Not sure

Spouse or partner's full names and surname

Spouse or partner's ID number

Any previous marriages? Give the dates and how each ended.

Are you paying maintenance under a court order or divorce settlement to anyone?

- ☐ Yes
 ☐ No
 ☐ Not sure

Children (including adopted, stepchildren and children from previous relationships)

Full names and surname	Date of birth	Biological / adopted / stepchild Biological / Adopted / Stepchild / Foster	Other parent (if not your current spouse)

Does any child or dependant have a disability or special needs that affect how they should inherit?

Anyone else financially dependent on you (parents, siblings, others)?

C What is already in place

Give us what you have. Leave blank anything you are not sure of.

Do you currently have a will? *

- ☐ Yes
 ☐ No
 ☐ Not sure

If yes — when was it signed and who drafted it?

Where is the original kept?

Does your spouse or partner have a will?

☐ Yes — separate will

☐ Yes — joint will with me

☐ No

☐ Not sure

Any existing trusts you founded, are a trustee of, or benefit from?

Do you have a living will (advance directive)?

☐ Yes

☐ No

☐ Not sure

Have you signed a power of attorney for anyone?

☐ Yes

☐ No

☐ Not sure

When did you last review your estate plan with an adviser?

☐ Never

☐ Within the last 2 years

☐ 2 to 5 years ago

☐ More than 5 years ago

D What you own

Approximate values are fine — we are sizing the estate, not valuing it. Round numbers to the nearest R10 000.

Worth knowing. Retirement fund benefits are paid out by the fund's trustees under section 37C of the Pension Funds Act and do not pass under your will. Life policies with a nominated beneficiary are paid directly to that person but are still counted for estate duty. We plan around both.

Immovable property (houses, flats, farms, plots, holiday homes)

Address or description	Registered in whose name? Me / Spouse / Joint / Trust / Company	Approximate value (R)	Bond outstanding (R)

Business interests (companies, close corporations, partnerships, sole proprietorships)

Entity name	Your shareholding or interest (%)	Approximate value of your interest (R)	Shareholders' or buy-and-sell agreement in place? Yes / No / Not sure

Do any of these businesses or trusts owe you money on loan account? Approximate amounts.

Investments and savings (unit trusts, shares, tax-free accounts, fixed deposits, crypto)

Approximate total cash in bank accounts (R)

 R

Retirement funds (pension, provident, retirement annuity, preservation funds)

Fund or administrator	Approximate value (R)	Nominated beneficiary on the fund's records

Life and funeral policies

Insurer	Sum assured (R)	Beneficiary nominated (or 'estate')	Ceded to a bank or anyone else? No / Yes / Not sure

Vehicles, boats, art, jewellery, collections, firearms and other valuables

Assets outside South Africa (property, accounts, investments, inheritances due)

Digital assets worth noting (crypto wallets, domain names, online businesses, monetised accounts)

Any inheritance or large gift you expect to receive?

Your rough estimate of your total net worth (R)

E What you owe

Debts and guarantees decide whether the estate will have enough cash to settle without selling assets your family wants to keep.

Total outstanding on home loans / bonds (R)

Other debts (vehicle finance, personal loans, credit cards, loans from family or businesses)

Have you signed surety or a guarantee for anyone's debt (including your own business)?

Are your tax affairs with SARS up to date?

- ☐ Yes — all returns filed and paid
- ☐ Returns outstanding
- ☐ Amount owing to SARS
- ☐ Not sure

Any pending litigation, claims against you, or disputes that could affect your estate?

F Your wishes

This is the heart of the plan. Tell us in plain language — we turn it into the right legal wording.

Worth knowing. If a child under 18 inherits directly and there is no trust, their inheritance is paid into the Guardian's Fund administered by the Master until they turn 18. Most parents prefer a testamentary trust so a trustee they choose manages the money, and the child receives it at an age they choose.

Who do you want as executor of your estate? *

Alternate executor if that person cannot act

Guardian for minor children (if both parents are gone)

Alternate guardian

Who should inherit the bulk of your estate, and in what shares? *

Specific items or amounts you want to leave to particular people or charities

Should inheritances for children be held in a trust until a certain age?

- ☐ Yes — until age 18
- ☐ Yes — until age 21
- ☐ Yes — until age 25
- ☐ Yes — another age (say in notes)
- ☐ No — pay out directly
- ☐ Not sure — advise me

If a trust is created, who should the trustees be?

Is there anyone you specifically want to exclude, or treat differently from the others?

Should your spouse or partner have the right to live in the home for life, with the property then going to someone else?

☐ Yes ☐ No ☐ Not sure

Who should take over or receive your business interests?

Funeral, burial, cremation or organ donation wishes

Would you like us to advise on a separate will for assets outside South Africa?

☐ Yes ☐ No
☐ Not applicable

G Priorities and concerns

Tick what matters most so we design around it.

What are you most trying to achieve?

- | | |
|---|---|
| ☐ Make sure my spouse or partner is provided for | ☐ Protect minor children or dependants |
| ☐ Reduce estate duty, CGT and executor's fees | ☐ Make sure there is enough cash in the estate to settle debts and costs |
| ☐ Keep the family home or farm in the family | ☐ Business succession or protecting my business partners |
| ☐ Protect assets from a beneficiary's creditors or divorce | ☐ Provide for a blended family fairly |
| ☐ Plan for assets or heirs outside South Africa | ☐ Support a charity or cause |
| ☐ Just get a valid, up-to-date will in place | |

If you died this month, would your estate have enough cash to pay debts, tax and costs without selling the home or business?

☐ Yes ☐ Probably not
☐ Not sure

How soon do you need this done?

☐ As soon as possible ☐ Within a month
☐ Within three months ☐ No particular deadline

Is there any family tension or history that could lead to a dispute over your estate?

Anything else we should know

H Documents to send with this form optional, but they save a round of emails

- | | |
|--|--|
| ☐ Copy of your ID (and your spouse or partner's ID) | ☐ Latest policy schedules and retirement fund statements |
| ☐ Marriage certificate and antenuptial contract, if any | ☐ Title deeds or latest bond statements for property |
| ☐ Divorce order and settlement agreement, if any | ☐ Shareholders' or buy-and-sell agreements for any business |
| ☐ Your existing will, and any trust deeds | ☐ Latest statement of assets and liabilities, if your accountant prepares one |

I Declaration and consent

I confirm that the information above is true and correct to the best of my knowledge, and I consent to Lawvero processing it and my supporting documents in order to advise on and attend to my estate planning, in accordance with the Protection of Personal Information Act 4 of 2013. I understand that this questionnaire is not a will and that no will or trust is in force until it has been properly drafted, signed and witnessed in terms of the Wills Act 7 of 1953 and the Trust Property Control Act 57 of 1988.

Signature

Date

Place

Spouse / partner's signature (if completing jointly)

What happens next. We review your answers, come back within two business days with any questions, and send you a written estate plan proposal and fixed-fee quote. Nothing is drafted and nothing is charged until you accept the quote. Call 065 764 3430 or email office@lawvero.co.za if you get stuck on any question.