

DECEASED ESTATE – FILING ORDER OF REPORTING DOCUMENTS

1. Death Notice
2. All Death Certificates (certified copy)
Ensure deaths of RSA citizens are registered at Dept. Home Affairs (“DHA”)
3. Police Report
In the case of “unnatural cause of death” // **affidavit confirming applicant was not involved in the death**
4. Identity Documents of the Deceased (certified copy)
5. Identity Document of Surviving Spouse (certified copy), if applicable
ICSM system requires the ID number to be populated in the relevant fields, even especially where the Marriage Certificate bear the old ID numbers previously issued by DHA
6. Identity Document of Applicant and Co-Executors (certified copy)
7. Birth Certificate of minor heir(s) (certified copy, if any)
Particularly in intestate estates. Also in s18(3) estates as these files become bound after LA is issued
8. Maintenance Certificate in respect of minor heir(s), if applicable
Particularly in intestate estates, to ascertain the authority of the signatory on the Nomination Form as the legal guardian of the minor child. Also in s18(3) estates as these files become bound after LA is issued.
9. Reporting Affidavit
In the case of the deceased dying in a foreign jurisdiction.
10. Marriage Declaration
Particularly where there is a disparity as to marital status between the Death Certificate and Marriage Certificate. Also where proof of marital status cannot be lodged at the time of reporting the estate.
11. Marriage Certificate(certified copy), if applicable
12. Antenuptial Contract (certified copy), if applicable
13. Divorce Order and Annexures (certified copy), if applicable **if divorced spouse is beneficiary in will**
14. Next-of-Kin Affidavit, if there is no Will.
Particularly in testate estate where the ex-spouse benefits in terms of the Will.
15. Inventory
16. Vouchers of assets
Particularly in section 18(3) Estates
17. Nomination Form

Ensure the original signed is lodged. This applies even in the case of overseas heirs.

18. Renunciation as nominated testamentary Executor

Ensure the original signed is lodged. This applies even in the case of overseas heirs.

19. Undertaking of Acceptance of Trust J155 – signed by each applicant (section 18(3) Estates)

OR

20. Acceptance of Trust as Executor - signed by each applicant (Letter of Executorship Estates).

Ensure the nominee capacity is stated.

Resolution