

LIFE FILE

PERSONAL INFORMATION

Surname: _____

Full Names: _____

Identity Number:

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Passport Number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Residential Address: _____

Postal Address: _____

Telephone Number: _____

Cell Number: _____

Email Address: _____

Income Tax Number: _____

MEDICAL INFORMATION

Medical Aid & Plan: _____

Medical Aid
Membership Number: _____

Contact Number: _____

Main Member: _____

Name of GP: _____

Contact Number: _____

Emergency Number: _____

FINANCIAL INFORMATION

Accountant: _____

Address: _____

Telephone Number: _____

Fax Number: _____

Email address: _____

Financial Advisor: _____

Address: _____

Telephone Number: _____

Fax number: _____

Email Address: _____

Pension Fund

Institution: _____

Policy Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Retirement Annuity

Institution: _____

Policy Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Life Annuity

Institution: _____

Policy Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Life Insurance Policy

Institution: _____

Policy Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Funeral Policy

Institution: _____

Policy Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Shares

Institution: _____

Share Certificate No.: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Shares

Institution: _____

Share Certificate No.: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Money Market Investments

Institution: _____

Account Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Money Market Investments

Institution: _____

Account Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Short Term Insurance

Institution: _____

Policy Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Short Term Insurance

Institution: _____

Policy Number: _____

Contact Person: _____

Telephone Number: _____

Email Address: _____

Banking Accounts

Bank Account 1

Account Holder:	
Bank:	
Branch & Branch Code:	
Account Number:	
Type of Account:	
Pin Number: (If preferred)	

Bank Account 2

Account Holder:	
Bank:	
Branch & Branch Code:	
Account Number:	
Type of Account:	
Pin Number: (If preferred)	

Bank Account 3

Account Holder:	
Bank:	
Branch & Branch Code:	
Account Number:	

Website: _____
Username: _____
Password: _____
Security Question: _____

Website: _____
Username: _____
Password: _____
Security Question: _____

Website: _____
Username: _____
Password: _____
Security Question: _____

Website: _____
Username: _____
Password: _____
Security Question: _____

Website: _____
Username: _____
Password: _____
Security Question: _____

Website: _____
Username: _____
Password: _____
Security Question: _____

CHECKLIST

(DOCUMENTS TO FILE WITH LIFE FILE)

1. Identity Documents
 - 1.1. Copy of my Identity Document;
 - 1.2. Copy of the Identity document of my Spouse;
 - 1.3. Copy of Birth Certificates of Minor Children;
 - 1.4. Copy of the Identity document of all Children
 - 1.5. Copy of Marriage Certificate
 - 1.6. Copy of Antenuptial Contract, If applicable.

2. Medical Aid Information
 - 2.1. Copy of Medical Aid Card
 - 2.2. Copy of Medical Aid Agreement

3. Driver's Licence
 - 3.1. Copy of my Driver's License Card (Back and Front)
 - 3.2. Copy of Driver's License of my spouse.

4. Firearm License
 - 4.1. Copy of Firearm License
 - 4.2. List of Firearms

5. Motor Vehicles
 - 5.1. Original Registration Documents
 - 5.2. Original License Documents
 - 5.3. Copy of vehicle finance agreement

6. Policies
 - 6.1. Copy of Life Annuity Policy Document
 - 6.2. Copy of Retirement Annuity Policy Document
 - 6.3. Copy of Funeral Policy Document.

7. Insurance
 - 7.1. Copy of Short-Term Insurance Policy Document
 - 7.2. Copy of Life Insurance Policy Document

8. Original Share Certificates

9. Copy of Latest Banking/Loan Account Statements

10. Copy of Divorce Order

11. Predeceased Spouse
 - 11.1. Copy of Letters of Executorship/Authority
 - 11.2. Copy of Death Certificate
 - 11.3. Copy of Liquidation and Distribution Account

12. Original Title Deeds for all Immovable Property

13. Copy of Recent Tax Return

14. Copy of latest Salary Slip
15. Copy of Municipal Account
16. Original Company Registration Documents
17. Original Trading Licenses
18. Copy of TV License document
19. Original VAT Certificate