

LIFE FILE CHECK LIST

	TICK	ORIGINAL / COPY / WHERE TO FIND ORIGINAL OR ITEM / COMMENT
Emergency Information :		
POWER OF ATTORNEY (ORIGINAL)		
LIVING WILL (ORIGINAL)		
LAST WILL AND TESTAMENT (ORIGINAL)		
CONTACT INFORMATION OF FAMILY, FRIENDS, COLLEAGUES		
CONTACT INFORMATION OF EXECUTOR (telephone, address, e-mail)		
CONTACT INFORMATION OF APPOINTED GUARDIANS FOR CHILDREN AND OTHER DEPENDANTS (telephone, address, e-mail)		
FUNERAL POLICIES		
PREFERRED FUNERAL PARLOUR		
FUNERAL WISHES (must align with funeral wishes in the Will)		
ESTATE PRESERVATION PLAN		
CONTACT INFORMATION OF EACH HEIR (telephone, address, e-mail)		
Personal :		
IDENTITY DOCUMENT AND/OR PASSPORT		
MARRIAGE CERTIFICATE		
ANTENUPTIAL CONTRACT		
DIVORCE ORDER & SETTLEMENT AGREEMENT		
DEATH CERTIFICATE AND LETTERS OF EXECUTORSHIP / LETTERS OF AUTHORITY OF ANY PREDECEASED SPOUSE AND CHILDREN		
CONTACT DETAILS OF BOOKKEEPER AND/OR AUDITOR		
Medical :		
MEDICAL AID COMPANY AND NUMBER		
GENERAL PRACTITIONER NAME AND CONTACT DETAILS		
SPECIALIST DOCTOR NAME AND CONTACT DETAILS		
EXISTING CONDITIONS AND ALLERGIES		
Children :		
CONTACT DETAILS OF APPOINTED GUARDIANS FOR MINORS		
ALL INFORMATION PERTAINING TO CHILDREN INCLUDING SCHOOL, MEDICATION, ALLERGIES, LIKES AND DISLIKES, CAPABILITIES, POLICIES AND ACCOUNTS IN THEIR NAMES, MEDICAL AID		
CONTACT DETAILS OF APPOINTED GUARDIANS FOR OTHER DEPENDANTS		
ALL INFORMATION PERTAINING TO OTHER DEPENDANTS INCLUDING EXISTING CONDITIONS, DOCTORS, MEDICATION, ALLERGIES, LIKES AND DISLIKES, CAPABILITIES, POLICIES AND ACCOUNTS IN THEIR NAMES, MEDICAL AID		
Employment :		
EMPLOYER NAME AND CONTACT DETAILS		
COPY OF SALARY SLIP		
INCOME TAX NUMBER		
INCOME TAX STATUS		
EMPLOYMENT PENSION / RETIREMENT ANNUITY		
COMPLETE LIST OF ASSETS AND LIABILITIES		

Movable and Immovable Assets :		
DETAILS OF MONEY OWED TO ME		
IMMOVABLE PROPERTY - PHYSICAL ADDRESS		
IMMOVABLE PROPERTY – DESCRIPTION AS PER TITLE DEED		
TITLE DEED (ORIGINAL)		
HOMELoAN DETAILS (original title deed will be with the mortgagee)		
REGISTERED REAL RIGHTS – DETAILS, TITLE DEED, FINANCE		
TIMESHARE – DETAILS, SHARE CERTIFICATE, FINANCE		
COPY OF MUNICIPAL AND LEVY ACCOUNTS		
LEASE AGREEMENTS FOR LEASED PROPERTIES		
TENANT NAMES AND CONTACT DETAILS		
REGISTERED PERSONAL RIGHTS (EG. USUFRUCT) – DETAILS, TITLE DEED, FINANCE		
VEHICLES		
VEHICLE REGISTRATION NUMBERS		
VEHICLE REGISTRATION PAPERS (ORIGINAL)		
VEHICLE FINANCE DOCUMENTS		
SAFETY DEPOSIT BOX DETAILS AND WHERE IS THE KEY KEPT		
FIREARM DETAILS		
FIREARM LICENCE (ORIGINAL)		
Bank Accounts, Policies, Pensions, Investments :		
BANK ACCOUNT DETAILS		
COPY OF BANK STATEMENT REFLECTING ALL DEBIT ORDERS		
WHO HAS THE ONLINE BANKING LOGIN (kept by online password manager or a trusted friend)		
SHORT-TERM INSURANCE POLICIES		
LONG-TERM INSURANCE POLICIES		
PENSIONS		
SHARE CERTIFICATES (ORIGINAL)		
INVESTMENT CERTIFICATES		
BITCOINS		
Contracts, Accounts, Memberships :		
STORE ACCOUNT DETAILS		
TELEPHONE		
CELLPHONE		
CELLPHONE PIN NUMBER		
DATA		
DATA PIN NUMBER		
TV LICENCE		
DSTV		
GYM		
Digital Information :		
E-MAIL ACCOUNTS		
SOCIAL MEDIA ACCOUNTS		
PASSWORDS & USERNAMES		

