

**Emmanuel and Grace Members Resources  
Personal Information Checklist in case of Death or Accident.**



This checklist is a suggested guideline for the information your loved ones or next of kin may need in the event of of your passing away or being incapacitated. This information could be kept in a file or scanned and kept on a memory stick.  
When this information is not easily accessible, it makes things very difficult for those who remain behind.  
So although it is not always comfortable to think about these things, it is a good thing to do....

You can adapt this list according to your own unique needs....

This checklist applies to all individuals/occupants of a household. So if appropriate there must be a checklist for each person for the items that are unique. Where information is shared (i.e. for married couples ) one list would suffice

Item	Y/N	Location/Refer/Contact
In Case of Emergency (ICE) document up-to-date and in place.		
In-case-of-Accident forms in all vehicles.		
Last Will and Testament (including executor details)		
Identity Documents / Passports - Certified copies		
Bank Account Details, Internet banking		
Full particulars of Savings-, Cheque-, Transmission- and Deposit Accounts at Banks, as well as		
Cheque Books, Credit- and other Cards, Internet banking and access instructions		
Computers used, Log ins, User ids, passwords		
Log Ins and passwords for devices/applications such as cellphones, i-pads, e-mail, Social media details, on-line trading, etc		
List and Amounts of Monthly accounts and method of payment		
List of current debit orders and bank accounts applicable		
Copies of Birth certificates		
Copy of Marriage Certificate (if married)		
Copy of Ante-nuptial Contract (if married Out of Community of Property)		
Copy of Divorce Order and Settlement Agreement (if divorced)		
Names, Telephone Numbers, Postal Addresses, e-Mail Addresses of Next of Kins		
List of Names and contact details of people to be notified in case of death		
List of immovable properties		
Original Title - and Transport Deeds.		
Timeshare-documents.		
Copies of Rental/Lease Agreements.		
List of fixed assets		
Mortgage bond registration documents and status of repayment		
Shares- and Investment Certificates, Unit Trusts		
Policy Contracts		

Retirement Annuities/Pension Fund Documents		
Copy of Short Term Insurance Contracts		
Copies of Hire Purchase/Lease Documents, Outstanding Accounts, Loans or Debts		
Complete List of all Liabilities, as well as Statements reflecting Outstanding Amounts		
Income Tax (Reference Number, Last Assessment and Office Submitted to)		
Full particulars of Pension Fund/Provident Fund/Particulars of Employer (Address and Employee Number)		
Copy of Salary Advice		
Motor Vehicle Insurance, Registration Certificates, License renewal		
Motor vehicle ownership details, eg paid-up, lease, HP, with documentation		
Licenses for Firearms and physical location of said firearms		
Copies of Municipal Services Accounts (Water- and Lights- and Property Levy/Tax Accounts)		
Copy of Telephone Accounts		
Copy of TV License		
Copy of Cell phone contracts		
Name, Address and Telephone Numbers of General Practitioner (Dr), Dentist and specialists		
Details of medication and reference to prescribing doctor		
Full particulars of Medical Aid		
Organ donation undertakings particulars		
Record of any implants e.g. Pacemaker, etc		
Details of Companies/Partnerships/Trusts/Close Corporations/Sole Proprietorships		
Information with regards to recently Sold Assets (Capital Assets Sold/Disposed of		
Business Contracts/Agreements		
VAT Registration Number (where applicable)		
Trade Licenses		
Details of Surety Obligations		
Memberships of organisations, cultural, recreation, etc		
Details of Bookkeeper/Auditor/Tax Consultant/Financial Consultant		
In case of eventualities such as theft, loss, fire, etc, it is prudent to keep copies off-site (electronic or otherwise) of the above		
See: DOCUMENT AND INFORMATION REQUIRED FOR THE REPORTING AND ADMINISTRATION OF AN ESTATE		
Any other significant issues (Specify)		