













LEGACY DRAWER: KEEP YOUR FAMILY PREPARED

Don't overlook this essential part of your financial plan. We recommend that you keep a Legacy Drawer which could contain the following information:

ITEM	WHERE TO FIND IT	NOTES
 LEGACY LETTERS to loved ones, Favourite recipes, Family heirlooms you wish to pass on etc.		
 WILL & ESTATES: Name of the executor, Latest will and codicils, Family's wills, List of heirs and contact details and Living will.	(Where is the original will?) (Contact details of Financial Planner)	
 FUNERAL: Funeral policy, Burial or cremation? Donation of body or tissue (organ donor registration details), Songs or speeches, Flowers, Pallbearers, Coffin, Preferred program for the service, donations etc.		Normally, the undertaker will assist your family with this. They will obtain the medical certificate, register the death and arrange for the issue of the death certificate.
 IMPORTANT DOCUMENTS: ID document, Passport, Marriage certificate, Antenuptial / post-nuptial contract, Divorce orders / Separation agreements, Mortgage / Title deeds / Leases, Car registration documents and Driver's license etc.		
 BANKING INFORMATION: Savings and Current account details, Credit cards, Safe deposit box and key, Fixed deposits etc.		
 TAX DOCUMENTS: Income tax returns (latest copy) and Financial records.		
 HOUSEHOLD BILLS: A copy of latest budget or list of monthly expenses.		

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 <p>EMPLOYMENT BENEFITS:</p> <p>Provide the contact details of the relevant person at your company. Summary of risk benefits at work.</p>		
 <p>INSURANCE:</p> <p>All insurance information and policies: Medical Aid, Car and short-term insurance, Gap cover, Life / Disability, and Dread disease cover.</p>		Your Financial Planner would be able to help with this.
 <p>INVESTMENTS:</p> <p>Listed shares, Coin/ Stamp collection, Unit trusts, Participation bond certificates, Time-share, Endowments, Retirement annuities, Preservation Funds, Pension / Provident Fund, Living / Life Annuities, Crypto currencies, Unlisted assets, Business assets, Debtors/ Creditors, Outstanding debts, Balance sheet, Properties and rental agents, and Other income streams.</p>		Your Financial Planner would be able to help with this.
 <p>LEGAL CONTRACTS:</p> <p>Business agreements, Hire purchase agreement, Surety agreements, Loan agreements, Power of Attorney, Trust deeds, Accountant and Lawyer contact details.</p>		
 <p>PASSWORDS & PIN CODES:</p> <p>Social media, SARS eFiling, Cellular phone/ Computer, Online accounts, Internet banking and Crypto currencies. Pin codes.</p>		
 <p>PETS:</p> <p>Wishes, Pet insurance and medical aid detail.</p>		

Please feel free to contact us at pwm@privatewealth.co.za or visit www.privatewealth.co.za for more information or [read our article](#).

This document is a guideline and for information purposes only. Please contact your Financial Planner for assistance.