



DEATH CLAIM CHECK LIST

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| Name | |
| Date of Birth | |
| Date of Death | |

| INFORMATION/DOCUMENTATION TO BE OBTAINED | COMMENT |
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| 1. Original certified copy of death certificate | |
| 2. Original certified copy of deceased's ID | |
| 3. Original certified copy of all dependants and guardians ID's | |
| 4. Birth certificates for children where ID is not available | |
| 5. Death Notification Form (Administrators standard) | |
| 6. Form A & D | |
| 7. Marriage certificate | |
| 8. Deceased's payslip for month of death and preceding month | |
| 9. Dependants relationship with deceased | |
| 10. Expression of Wish Form | |
| 11. Proof of dependency for any major children and doubtful cases | |
| 12. Extent of dependency of each dependant | |
| 13. Appointed Guardian of minor children | |
| 14. Appointed caregiver – obtain a certificate of appointment as a caregiver from the South African Social Security Services | |
| 15. Address and Banking details of major dependants, spouse and guardians | |
| 16. If no dependants, details of executor must be supplied | |
| 17. Details of financial affairs of major dependants (such as salary slips and bank account) | |
| 18. Indication of potential future earning capacity of dependants (a teacher, doctor etc) | |
| 19. Affidavit from all guardians confirming minors benefit to be paid into a trust | |
| 20. If the guardian indicates cash and the Trustees are doubtful whether to pay cash, then proof that the guardian is capable of managing the financial affairs of the minor | |
| 21. Affidavit from major dependants stating that there are no other dependants | |



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| DEPENDANTS: | All children Factual dependants |
| NOMINEES: | Any non-dependant entered on Expression of Wish Form |
| NB: A dependant and a nominee must be a natural person. | |
| PROOF OF DEPENDANCY: | Such as an affidavit by a relative or family friend, a birth certificate indicating parents, Membership of medical aid. |
| GUARDIAN: | The natural mother or father of any minor child or in their absence a responsible person appointed by the Trustees or by the state. |
| CAREGIVER: | A person responsible for minor children who has been appointed by the South African Social Security Services |
| EXTENT OF DEPENDANCY: | Dependant on housing, food, clothes, study and other relevant reasons. A minor child is for example 100% dependant for basic living expenses and schooling. |
| RELATIONSHIP: | Son, daughter, spouse, common law spouse, mother, father, friend etc |
| CAPABLE OF MANAGING THE FINANCIAL AFFAIRS | Not a declared prodigal, Estate sequestrated, under curatorship. |

