

Montana Forum  
Tecomariastraat 20, Montana 0186  
Posbus 906 453, Magalieskruin, 0150  
Tel: 012 548 6460  
Faks: 012 548 4130  
Reg. No. 2003/011603/07  
www.lubbestrust.co.za



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20 Tecomaria Street, Montana 0186  
PO Box 906 453, Magalieskruin, 0150  
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**INLIGTING VIR DIE OPSTEL VAN 'N TESTAMENT/ INFORMATION FOR DRAFTING OF A WILL**

- |   |  |
|---|--|
| <input type="checkbox"/> Enkel/Single                 | <input type="checkbox"/> Afrikaans           |
| <input type="checkbox"/> Gesamentlik/Joint            | <input type="checkbox"/> English             |
| <input type="checkbox"/> Nuwe aansoek/new application | <input type="checkbox"/> Hersiening/Revision |

Kan die aansoeker(s) lees en skryf / Can the applicant (s) read and write  JA/YES  NEE/NO

**TESTATEUR / TESTATOR**

Van / Surname \_\_\_\_\_  
Volle name / Full names \_\_\_\_\_  
ID nommer / ID number \_\_\_\_\_  
Beroep / Occupation \_\_\_\_\_  
Kontak telefoon/sel nommer  
Contact telephone/cell number \_\_\_\_\_  
Epos / Email \_\_\_\_\_

**TESTATRISE / TESTATRIX**

Van / Surname \_\_\_\_\_  
Volle name / Full names \_\_\_\_\_  
Nooiensvan / Maidenname \_\_\_\_\_  
ID nommer / ID Number \_\_\_\_\_  
Beroep / Occupation \_\_\_\_\_  
Kontak telefoon/sel nommer  
Contact telephone/cell number \_\_\_\_\_  
Epos / Email \_\_\_\_\_

**HUWELIKSTAAT / MARITAL STATUS**

- |   |   |   |   |
|---|---|---|---|
| <input type="checkbox"/> Ongetroud<br>Unmarried | <input type="checkbox"/> Geskei<br>Divorced                             | <input type="checkbox"/> Wewenaar/Weduwee<br>Widower/Widow                  |   |
| <input type="checkbox"/> Getroud<br>Married     | <input type="checkbox"/> <i>Binne Gemeenskap</i><br><i>In Community</i> | <input type="checkbox"/> <i>Buite Gemeenskap</i><br><i>Out of Community</i> | <input type="checkbox"/> <i>Met aanwas</i><br><i>With Accrual</i> |

Ander huweliksvorm / Other marital status \_\_\_\_\_

**ADRES / ADDRESS**

Woonadres/ Residential

Posadres / Postal address

kode/code

**KINDERS / CHILDREN**

Ingesluit wettige aangenome kinders / Including legally adopted children)

Huidige huwelijk / Present marriage

Volle name / Full names

Geslag/Sex

Geboortedatum / Date of birth

M V/F

1.	<input type="checkbox"/>	<input type="checkbox"/>	
2.	<input type="checkbox"/>	<input type="checkbox"/>	
3.	<input type="checkbox"/>	<input type="checkbox"/>	
4.	<input type="checkbox"/>	<input type="checkbox"/>	
5.	<input type="checkbox"/>	<input type="checkbox"/>	

Vorige huwelijk van testateur / Previous marriage of testator

Volle name / Full names

Geslag/Sex

Geboortedatum / Date of birth

M V/F

1.	<input type="checkbox"/>	<input type="checkbox"/>	
2.	<input type="checkbox"/>	<input type="checkbox"/>	
3.	<input type="checkbox"/>	<input type="checkbox"/>	
4.	<input type="checkbox"/>	<input type="checkbox"/>	
5.	<input type="checkbox"/>	<input type="checkbox"/>	

Vorige huwelijk van testatriese / Previous marriage of testatrix

Volle name / Full names

Geslag/Sex

Geboortedatum / Date of birth

M V/F

1.	<input type="checkbox"/>	<input type="checkbox"/>	
2.	<input type="checkbox"/>	<input type="checkbox"/>	
3.	<input type="checkbox"/>	<input type="checkbox"/>	
4.	<input type="checkbox"/>	<input type="checkbox"/>	
5.	<input type="checkbox"/>	<input type="checkbox"/>	

**ERFGENAME / HEIRS**

Indien onvoldoende spasie, heg addisionele bladsy aan / If insufficient space attach additional page

1. Meld volle name, verwantskap, ID of geboortedatum / State full names, relationship, ID or date of birth
2. Erfgename moet identifiseerbaar wees / Heirs must be identifiable

		Ja / Yes	Nee/No
Testateur eerssterwende	Testatrise enigste erfgenaam	<input type="checkbox"/>	<input type="checkbox"/>
Testator first dying	Testatrix sole heir	<input type="checkbox"/>	<input type="checkbox"/>

Indien nie / If not:

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		Ja / Yes	Nee/No
Testatrise eerssterwende	Testateur enigste erfgenaam	<input type="checkbox"/>	<input type="checkbox"/>
Testatrix first dying	Testator sole heir	<input type="checkbox"/>	<input type="checkbox"/>

Indien nie / If not:

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		Ja / Yes	Nee/No
Afsterwe van langsewende of gelyktydige afsterwe	Kinders enigste erfgename	<input type="checkbox"/>	<input type="checkbox"/>
Death of survivor or simultaneous death	Children sole heirs	<input type="checkbox"/>	<input type="checkbox"/>

Indien nie / If not:

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Gesinsuitwissing / Family obliteration

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**TRUST**

Tot en met / until	21	25	Ander/other
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**VOOG / GUARDIAN**

Naam/ Name

Verwantskap/ Relationship

Adres/ Address

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<b>EKSEKUTEUR EN TRUSTEE / EXECUTOR AND TRUSTEE</b>
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Lubbes Trust (Edms) Bpk / Lubbes Trust (Pty) Ltd

Ander / Other

Naam / Name \_\_\_\_\_

ID nommer / ID number \_\_\_\_\_

Verwantskap / Relationship \_\_\_\_\_

<b>BOEDELBATES TEEN MARKWAARDE / ESTATE ASSETS MARKET VALUE</b>
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Indien getroud binne gemeenskap van goedere, voltooi slegs testateur se gedeelte – behalwe versekering /

If married in community of property, complete only testator's portion with exception of assurance

	<b>Testateur/ Testator R</b>	<b>Testatrise/ Testatrix R</b>
<p><u>VASTE EIENDOM / FIXED PROPERTY</u></p> <ul style="list-style-type: none"> <li>• <u>RESIDENSIEEL/ RESIDENTIAL</u></li> </ul>		
<ul style="list-style-type: none"> <li>• <u>PLAAS EIENDOM/ FARM PROPERTY</u></li> </ul>		
<ul style="list-style-type: none"> <li>• <u>ANDER/ OTHER</u></li> </ul>		
<p><b><u>BOERDERY BATES/ FARMING ASSETS</u></b></p> <ul style="list-style-type: none"> <li>• Plaasvoertuie/ Farming vehicles</li> <li>• Implemente/ Implements</li> <li>• Lewende hawe/ Live stock</li> <li>• Oes op lande/ Crops on land</li> </ul>		
<p><b><u>ROERENDE BATES/ MOVABLE ASSETS</u></b></p> <ul style="list-style-type: none"> <li>• Voertuie/ Vehicles</li> <li>• Meublement/ Furniture</li> <li>• Vuurwapens/ Fire arms</li> <li>• Ander / Other:</li> </ul>		

<b><u>SAKEBELANGE/ BUSINESS INTERESTS</u></b>		
• Aandele in privaatmaatskappye/ Private company shares		
• Leningsrekening/ Loan account		
• Belang in beslote korporasie/ Close corporation interest		
• Leningsrekening/ Loan account		
• Venootskapsbelang/ Partnership interest		
• Eenmansaak/ Sole proprietor		

<b><u>BELEGGINGS/ INVESTMENTS</u></b>		
• Kontantbeleggings/ Cash Investments		
• Verbande (lenings) / Bonds (loans)		
• Effektetrusts/ Unit trusts		
• Genoteerde aandele / Listed shares		
<b><u>VERSEKERING BETAALBAAR AAN BOEDEL (INGESLUIT GESEDEER AS SEKURITEIT) / ASSURANCE PAYABLE TO ESTATE (INCLUDING CEDED AS SECURITY)</u></b>		
<b>TOTALE BATES/ TOTAL ASSETS</b>		

<b><u>BOEDEL LASTE / ESTATE LIABILITIES</u></b>		
• Verbande / Mortgage Bonds		
• Oortrokke bankrekeninge / Bank overdrafts		
• Ander skulde / Other debts		
<b>TOTALE LASTE / TOTAL LIABILITIES</b>		

**INGESTUUR DEUR / SUBMITTED BY**

Naam / Name

Adres/ Address

kode/code

Tel. No

Sel Nr. / Cell No

Epos / Email

Datum ingedien / Date submitted

**ADDISIONELE INLIGTING / ADDITIONAL INFORMATION**