CONFIDENTIAL CLIENT INSTRUCTION DOCUMENT

Will and Estate Planning Instruction Questionnaire

FOR ATTORNEY REVIEW - NOT A FINAL OR EXECUTED WILL

This fillable questionnaire is designed to help Wessels & Smith Incorporated collect the information needed to advise you and prepare a draft will. Completing, typing your name into, saving, printing or emailing this document does not sign, execute, amend or revoke a will. A final will must be prepared or approved and then signed in accordance with the applicable legal formalities.

HOW TO COMPLETE AND SUBMIT THIS FORM

1. Download and save the PDF to your device before entering information.
2. Complete one questionnaire for each person whose will is to be prepared, unless the attorney directs otherwise.
3. Complete every relevant section. Enter 'Not applicable' where a question does not apply.
4. Save the completed PDF under your full name and retain a copy for your records.
5. Attach clear copies only. Never email original wills, title deeds or identity documents.
6. Email the form to info@wessmith.co.za with the subject: WILLS QUERY - [YOUR FULL NAME].
7. Wessels & Smith will contact you to clarify instructions, advise on options and arrange the next steps.

WESSELS & SMITH INCORPORATED

Attorneys | Notaries | Conveyancers

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Telephone: +27 57 391 9800

Email: info@wessmith.co.za

Website: www.wessmith.co.za

Please arrange a private consultation if any instruction is sensitive, disputed or may expose you to pressure from another person.

Personal details and independent instructions

The person whose will is to be prepared is referred to in this questionnaire as the client or testator. Each client should normally complete a separate questionnaire.

IMPORTANT

Tell the attorney if anyone is helping you complete this form, if you require an interpreter or accessibility support, or if illness, medication, disability, communication difficulty or pressure from another person may affect your ability to give independent instructions.

Full legal names

Surname

Previous names, aliases or maiden surname

Preferred name

South African ID or passport number

Date of birth (DD/MM/YYYY)

Country of birth

Citizenship / nationality

Country of ordinary residence

Tax residence(s)

Occupation / profession

Employer / business name

Residential address

Postal address, if different

Email address

Mobile / telephone number

WhatsApp number

Preferred language

Preferred contact method

- [ ] Telephone
- [ ] Email
- [ ] WhatsApp
- [ ] In-person consultation

Voluntary and capacity review

Client confirmations

- [ ] I am 16 years or older
- [ ] I am giving these instructions voluntarily
- [ ] I understand that I am giving instructions for a will
- [ ] I want an opportunity to speak to the attorney privately

Urgency, planned travel, operation, serious illness or deadline affecting the consultation

Preferred consultation arrangements

- [ ] Private in-person consultation
- [ ] Private video consultation
- [ ] Private telephone consultation
- [ ] Please contact me to arrange suitable safeguards

Estate-planning goals and priorities

This section helps the attorney understand what you want the estate plan to achieve, not only who should inherit.

Main reasons for preparing or updating a will

- ☐ No current will
- ☐ Marriage or new partnership
- ☐ Birth or adoption of a child
- ☐ Divorce or separation
- ☐ Death of a family member
- ☐ Acquisition or sale of property
- ☐ Business or trust changes
- ☐ Retirement or health changes
- ☐ Foreign assets or relocation
- ☐ Existing will is outdated
- ☐ Family dispute or vulnerability
- ☐ General review and peace of mind

Your three most important estate-planning goals

Examples: provide for a spouse, protect minor children, preserve a family property, ensure business continuity, support a dependant, reduce administration difficulties or make a charitable gift.

People or organisations you consider your primary responsibilities

Assets or interests that must be preserved, retained in the family or dealt with in a particular way

Planning concerns requiring advice

- ☐ Minor children
- ☐ Vulnerable or disabled beneficiary
- ☐ Insolvent or financially irresponsible beneficiary
- ☐ Second marriage or blended family
- ☐ Family conflict
- ☐ Business succession
- ☐ Farm or agricultural property
- ☐ Mining or prospecting rights
- ☐ Foreign assets or beneficiaries
- ☐ Insufficient cash in the estate
- ☐ Potential tax exposure
- ☐ Expected challenge to the will

Any urgent deadline, travel, operation, illness or other reason for expedited advice

Relationship and marital status

Marital status and the matrimonial property system can materially affect ownership, claims and estate distribution. Attach relevant documents where available.

Current status - tick the most accurate description

- ☐ Never married
- ☐ Married
- ☐ Civil union
- ☐ Customary marriage
- ☐ Life partnership / cohabitation
- ☐ Separated but not divorced
- ☐ Divorced
- ☐ Widowed

Spouse or partner full names

Spouse or partner ID / passport number

Date of marriage / union

Place and country of marriage / union

Matrimonial property system

- ☐ In community of property
- ☐ Out of community without accrual
- ☐ Out of community with accrual
- ☐ Customary marriage property arrangement
- ☐ Foreign matrimonial regime
- ☐ Uncertain - please advise

Antenuptial contract details

Include notary, date, protocol or registration details if known. Attach a copy.

Does your spouse or partner also require a will review?

- ☐ Yes
- ☐ No
- ☐ Uncertain / discuss at consultation

Previous marriages, civil unions or long-term partnerships

Give names, dates, how each relationship ended and whether any former spouse or partner has maintenance, pension, property or other claims.

Divorce order, settlement agreement, maintenance order or family court order

Describe all ongoing obligations, property arrangements or rights. Attach copies where applicable.

Other relationship or family circumstances relevant to the estate

Children and dependants - identification

Include biological and adopted children, children from prior relationships, children born outside marriage, stepchildren you intend to benefit, and any other person who depends on you financially.

WHY THIS MATTERS

Minor or financially dependent beneficiaries may require guardianship provisions, maintenance instructions, a testamentary trust and substitute beneficiaries. Include unborn children where relevant.

FULL NAMES	ID / BIRTH CERT.	DATE OF BIRTH	RELATIONSHIP / STATUS	MINOR?	DEPENDANT?

Details of any child conceived but not yet born, child whose parentage may be disputed, or child omitted above

Other persons who rely on you financially or personally

Include elderly relatives, adult children, former partners, household members, employees or persons with disabilities whom you support.

Guardianship and care of minor children

A guardian nomination is an important instruction but remains subject to applicable law and the best interests of the child. Discuss the proposed appointment with the intended guardian where practical.

Preferred guardian full names

Relationship to child or children

ID / passport number

Telephone and email

Residential location and household circumstances of preferred guardian

Alternative guardian full names

Alternative guardian contact details

Have the proposed guardians been consulted?

- ☐ Primary guardian - yes
- ☐ Primary guardian - no
- ☐ Alternative guardian - yes
- ☐ Alternative guardian - no

Reasons for your preferred appointment

Care, residence, education, religious, cultural, language or sibling-group preferences

Financial arrangements intended to support the child and guardian

Any person who should not be considered as guardian, with confidential reasons

Additional guardian instructions

- ☐ Siblings should remain together where possible
- ☐ Guardian may relocate within South Africa
- ☐ International relocation requires prior consultation
- ☐ Please advise on co-guardians or separate guardians

Existing wills, executor and professional appointments

The Master of the High Court makes the formal appointment of an executor. The will may nominate a preferred executor and alternatives.

Do you have an existing will or codicil?

☐ No ☐ Yes - original available ☐ Yes - copy only ☐ Uncertain

Date of latest will or codicil

Where is the original kept?

Who prepared the existing will?

Reference number, if known

What should happen to the existing will?

☐ Replace it completely
☐ Amend selected provisions
☐ Review before deciding
☐ Please advise

Existing estate-planning documents

List trusts, beneficiary nominations, living wills, advance healthcare directives, powers of attorney, succession plans, buy-and-sell agreements and letters of wishes.

EXECUTOR NOMINATION

The executor administers the estate, identifies assets and liabilities, deals with creditors and distributes the estate under the will and applicable law.

Preferred executor full name / entity

Relationship or professional capacity

ID / registration number

Telephone and email

Alternative executor

Alternative executor contact

Executor instructions

☐ Consider Wessels & Smith for appointment
☐ Please advise on an appropriate executor
☐ Consider exemption from furnishing security
☐ Allow appointment of professional agents, subject to drafting advice

Additional executor instructions or concerns

Testamentary trust and trustees

A testamentary trust is created by the will and operates after death. It may be suitable for minors, vulnerable beneficiaries, staged inheritances or particular assets.

Should the attorney consider a testamentary trust?

- ☐ Yes
- ☐ No
- ☐ Uncertain - please advise
- ☐ An existing trust may be relevant

Purpose of the proposed trust

Examples: minor children, education and maintenance, disability support, staged access to capital, preservation of a family property or protection of a vulnerable beneficiary.

Preferred trustee 1

Trustee 1 contact details

Preferred trustee 2

Trustee 2 contact details

Alternative trustee

Alternative trustee contact

Trust beneficiaries

Preferred age or event for final distribution

Should distributions differ according to need?

Purposes for which trustees may use income or capital

- ☐ Maintenance and living costs
- ☐ Education and training
- ☐ Medical and disability expenses
- ☐ Housing
- ☐ Business or professional development
- ☐ Other - explain below

Special trustee powers, restrictions, replacement procedures or family circumstances

ATTORNEY REVIEW REQUIRED

Trust terms must be drafted for the particular family, beneficiaries and assets. This questionnaire is not trust wording or legal advice.

Beneficiaries - primary list

A beneficiary is a person, trust or organisation intended to receive a benefit. Include full identifying information and a substitute beneficiary where possible.

FULL LEGAL NAME / ENTITY	ID / REG. NO.	RELATIONSHIP	BENEFIT OR %	SUBSTITUTE BENEFICIARY

Conditions, special needs, exclusions from community of property, or other instructions applying to beneficiaries above

Beneficiaries - continuation and risk review

Use this page for additional beneficiaries, charities, trusts, substitute beneficiaries and beneficiary-specific concerns.

FULL LEGAL NAME / ENTITY	ID / REG. NO.	RELATIONSHIP	BENEFIT OR %	SUBSTITUTE BENEFICIARY

Indicate whether any beneficiary is

- ☐ A minor
- ☐ Financially dependent
- ☐ Living outside South Africa
- ☐ A person with a disability or special need
- ☐ A charity or non-profit organisation
- ☐ A trust or company
- ☐ Insolvent or exposed to creditor risk
- ☐ Involved in a family dispute

Further beneficiary information, confidentiality concerns or intended unequal treatment

Specific bequests - property, money and personal items

A specific bequest leaves a particular asset, right or amount to a named beneficiary. Describe the item precisely and nominate an alternative where possible.

ASSET / AMOUNT / RIGHT	IDENTIFYING DETAILS	PRIMARY BENEFICIARY	SUBSTITUTE / ALTERNATIVE

Conditions, rights of occupation, usufructs or explanations for the bequests above

Additional bequests and residue of the estate

The residue is everything remaining after debts, administration expenses and specific bequests have been dealt with.

ASSET / AMOUNT / RIGHT	IDENTIFYING DETAILS	PRIMARY BENEFICIARY	SUBSTITUTE / ALTERNATIVE

RESIDUE OF THE ESTATE

State who should receive the residue and in what proportions. Percentages should total 100%.

RESIDUARY BENEFICIARY	ID / REG. NO.	PERCENTAGE	SUBSTITUTE / REPRESENTATION

If a beneficiary dies before you, should the attorney consider

- ☐ Descendants inheriting by representation
- ☐ The named substitute beneficiary
- ☐ Reallocation among surviving beneficiaries
- ☐ A minimum survival period - please advise

Simultaneous-death, survivorship or alternative-distribution instructions

Immovable property, farms and property rights

List all property, including jointly owned property and property outside South Africa. Approximate values assist with liquidity and planning.

PROPERTY / RIGHT	OWNERSHIP & REFERENCE	LOCATION	APPROX. VALUE	INTENDED TREATMENT

Property categories represented above or requiring advice

- ☐ Residential property
- ☐ Commercial property
- ☐ Farm / agricultural property
- ☐ Sectional title
- ☐ Vacant land
- ☐ Mineral or prospecting rights
- ☐ Leasehold or occupation right
- ☐ Foreign immovable property

Rights, restrictions or liabilities affecting property

Include mortgage bonds, co-ownership, usufructs, rights of occupation, leases, servitudes, land claims, pending transfers, sale agreements or disputes.

Property that should be sold, retained, transferred together or kept in the family

Bank accounts, investments and amounts owing

Include assets held alone, jointly, through a nominee, online platform or outside South Africa.

INSTITUTION / DEBTOR	ACCOUNT / REFERENCE	TYPE OF ASSET	OWNERSHIP	APPROX. VALUE

Financial asset categories

- ☐ Bank accounts
- ☐ Unit trusts / collective investments
- ☐ Private investments
- ☐ Money owed to you
- ☐ Fixed deposits
- ☐ Listed shares
- ☐ Cryptocurrency or digital value
- ☐ Foreign accounts or investments

Nominees, joint-signing arrangements, advisers, safe-deposit boxes or access arrangements

Lifetime loans made to family members, trusts, businesses or beneficiaries

Movable property, regulated assets and digital property

List valuable movable items and digital property. Do not include passwords or secret recovery phrases in this questionnaire.

ASSET / COLLECTION	IDENTIFYING DETAILS	LOCATION / CUSTODIAN	APPROX. VALUE	INTENDED TREATMENT

Categories requiring attention

- ☐ Vehicles and machinery
- ☐ Jewellery and watches
- ☐ Art, antiques or collections
- ☐ Household contents
- ☐ Intellectual property
- ☐ Domain names and websites
- ☐ Digital wallets or valuable digital assets
- ☐ Regulated assets requiring special transfer arrangements

Important online accounts, business systems, cloud storage or social media

Where access instructions are stored

Do not write passwords, PINs, private keys or recovery phrases in this form.

Personal records, photographs, manuscripts, family archives or heirlooms

Insurance, retirement benefits and beneficiary nominations

Certain policy or retirement-fund benefits may be governed by beneficiary nominations or legislation rather than by the will. Provide current details for review.

PROVIDER / FUND	POLICY / MEMBER NO.	BENEFIT TYPE	CURRENT NOMINEE	ESTIMATED VALUE

Benefit types

- ☐ Life policy
- ☐ Endowment
- ☐ Retirement annuity
- ☐ Pension fund
- ☐ Provident fund
- ☐ Funeral policy
- ☐ Medical scheme or employment benefit
- ☐ Business or buy-and-sell policy

Purpose of policies or benefits

For example: settle debt, support dependants, provide estate cash, fund business succession or benefit a specific person.

Approximate cash readily available to the estate

Estimated immediate family and funeral needs

Policies ceded as security, subject to a trust, jointly owned or connected to a business

Business, trust, mining and foreign interests

Attach relevant agreements and recent records. Business and cross-border assets may require coordinated succession, tax and regulatory advice.

ENTITY / INTEREST	REG. / REFERENCE	OWNERSHIP / ROLE	CO-OWNERS / TRUSTEES	INTENDED OUTCOME

Interest types

- ☐ Private company shares
- ☐ Partnership
- ☐ Trust interest
- ☐ Mining / prospecting / mineral rights
- ☐ Close corporation membership
- ☐ Sole proprietorship
- ☐ Farm or agricultural enterprise
- ☐ Foreign company, trust or property

Existing succession, shareholder, partnership, members or buy-and-sell arrangements

Business loans, shareholder loans, guarantees or key-person insurance

Foreign wills, advisers, jurisdictions or tax considerations

Liabilities, obligations and potential claims

List all known debts, guarantees and possible claims, including personal and business liabilities, even if insured, disputed or jointly owed.

CREDITOR / CLAIMANT	ACCOUNT / REFERENCE	TYPE OF LIABILITY	APPROX. BALANCE	SECURITY / INSURANCE

Liability categories

- ☐ Mortgage bonds
- ☐ Personal loans
- ☐ Tax liabilities
- ☐ Suretyships or guarantees
- ☐ Vehicle or asset finance
- ☐ Credit cards or retail accounts
- ☐ Business debts
- ☐ Maintenance or support obligations

Pending or threatened litigation, claims, disputes or investigations

Amounts owed jointly with another person or secured by estate assets

Contractual obligations continuing after death, including leases, memberships or service agreements

Lifetime gifts, tax information and estate liquidity

This information assists the attorney in identifying planning risks. Specialist tax or financial advice may be recommended.

Significant lifetime gifts, donations or asset transfers made during the past several years

Include recipient, date, asset or amount, and whether the gift was intended as an advance on inheritance.

Loans, advances or benefits provided to intended beneficiaries

Assets sold or transferred to a spouse, trust, company or family member below market value

Approximate gross value of worldwide assets

Approximate total liabilities

Potential liquidity or tax concerns

- [ ] Estate may lack cash to settle costs or debt
- [ ] Property or business may need to be sold
- [ ] Estate duty advice may be required
- [ ] Capital gains tax may be material
- [ ] Foreign tax or reporting may apply
- [ ] Maintenance claims may affect distribution
- [ ] Retirement or policy nominations require review
- [ ] Please refer me to a suitable tax or financial adviser

Assets you do not want sold to pay costs, taxes or debts

Other tax, valuation, liquidity or financial-planning concerns

Personal wishes and practical arrangements

Some wishes may be better recorded in a separate letter of wishes and may not be legally binding. The attorney will advise what belongs in the will.

FUNERAL AND MEMORIAL PREFERENCES

These preferences should also be communicated to family because the will may only be read after arrangements have begun.

General preference

- ☐ Burial
- ☐ Cremation
- ☐ Religious or cultural rites
- ☐ No preference / family to decide

Funeral, memorial, burial place, ashes or organ-donation preferences

PERSONAL AND FAMILY COMMUNICATIONS

Letter of wishes, personal messages or explanations to be prepared separately

Person who should be informed immediately and where important records are kept

Safe, storage facility or custodian holding the original will and important documents

Practical preferences

- ☐ Family should receive a copy of a letter of wishes
- ☐ Executor should receive a digital-asset memorandum
- ☐ Attorney should retain the original signed will, if offered
- ☐ Please advise on safe custody arrangements

Special circumstances and confidential risk review

Disclose circumstances that could affect the drafting, validity, interpretation or administration of the will. Arrange a private consultation for sensitive information.

Indicate any matter requiring confidential discussion

- ☐ A beneficiary may challenge the will
- ☐ A family member is intentionally excluded
- ☐ There is serious family conflict
- ☐ You support a person not legally related to you
- ☐ A beneficiary is insolvent or exposed to creditors
- ☐ A beneficiary may be unable to manage money
- ☐ A beneficiary lives outside South Africa
- ☐ Assets or family members are in another country
- ☐ There are confidential children or relationships
- ☐ There are concerns about pressure or undue influence
- ☐ There is a pending divorce or separation
- ☐ Ownership of an asset is disputed or uncertain

Confidential explanation of matters ticked above

Persons who should not receive information or be contacted without your consent

Any concern about mental capacity, memory, communication, medication or independent decision-making

Any other legal, tax, family, medical or practical concern

Supporting documents and final instruction review

Please attach or email to info@wessmith.co.za.

Supporting documents attached or available

- ☐ ID / passport
- ☐ Spouse or partner ID
- ☐ Marriage certificate
- ☐ Antenuptial contract
- ☐ Divorce order or settlement agreement
- ☐ Existing will or codicil
- ☐ Trust deed / letters of authority
- ☐ Title deed / property statement
- ☐ Policy schedules
- ☐ Retirement fund statements
- ☐ Business registration documents
- ☐ Shareholder / partnership agreements
- ☐ Recent financial statements
- ☐ Asset and liability schedule
- ☐ Foreign will or adviser details
- ☐ Other documents listed below

Other attachments or documents to follow

FINAL REVIEW BEFORE SUBMISSION

Please confirm that you have reviewed the following

- ☐ All children and dependants are listed
- ☐ Primary and substitute beneficiaries are identified
- ☐ Residue percentages total 100%, where used
- ☐ All major assets and liabilities are disclosed
- ☐ Existing wills and trusts are disclosed
- ☐ Executor, guardian and trustee choices are complete
- ☐ Sensitive family or legal issues are disclosed
- ☐ Contact details are correct

Questions you want answered during the consultation

Summary of your final instructions in your own words

Client confirmation, submission and office use

The confirmation below records the accuracy and permitted use of the information. It is not the execution of a will.

CLIENT CONFIRMATION

By completing this section, you confirm only that the information supplied is accurate to the best of your knowledge and may be used by Wessels & Smith to advise you and prepare draft documents. This questionnaire is not a will and does not revoke, amend or execute an existing will.

Confirmations

- ☐ The information supplied is complete and accurate to the best of my knowledge
- ☐ I understand that this questionnaire is not a will and does not revoke an existing will
- ☐ I understand that Wessels & Smith may require further information and a consultation
- ☐ I consent to processing of the information for legal and estate-planning services
- ☐ I have authority to provide the personal information of other persons named in this form
- ☐ I will not sign a final will until advised that it is ready for proper execution

Full name confirming the above

Date (DD/MM/YYYY)

If printed, client signature (optional for instruction confirmation only)

HOW TO SUBMIT

Email: info@wessmith.co.za Subject: WILLS QUERY - [YOUR FULL NAME]

Printed copies may be delivered to 26-28 Heeren Street, Welkom, Free State. Telephone +27 57 391 9800.

FOR WESSELS & SMITH OFFICE USE ONLY

File / matter reference

Date received

Responsible attorney / professional

Consultation date

Initial review status

- ☐ Complete enough for consultation
- ☐ Further information required
- ☐ Conflict check required
- ☐ Foreign or tax advice may be required
- ☐ Urgent review requested
- ☐ Drafting authorised

Missing information, follow-up questions and internal notes