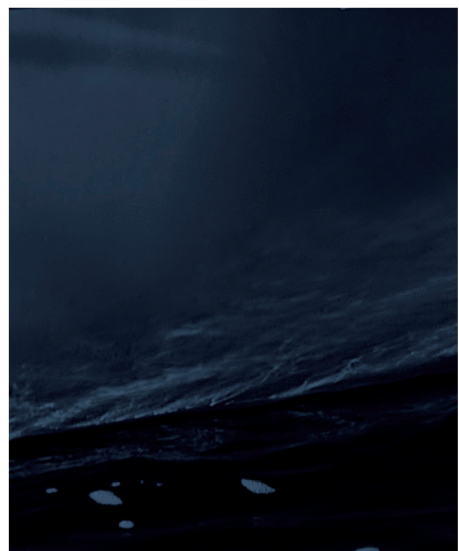
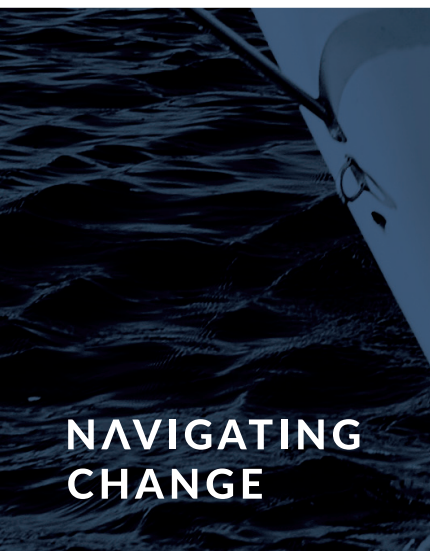
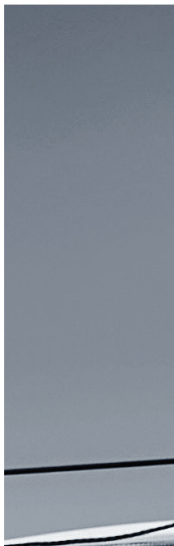
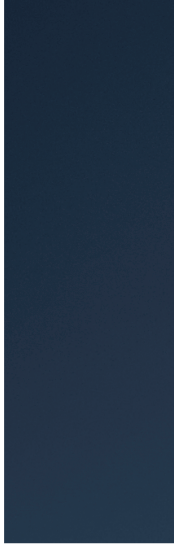
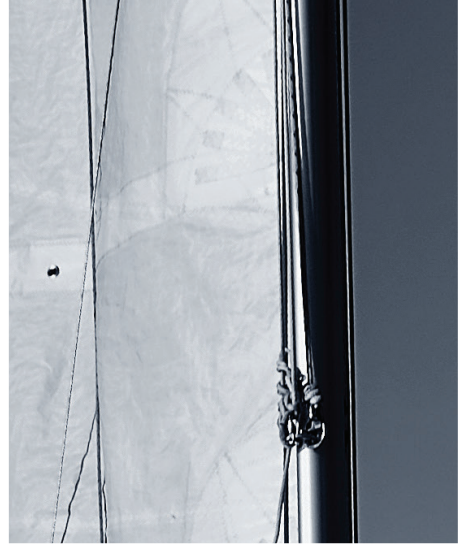


ANCHOR

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The Anchor Life File

Information for life.



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The **Anchor** Life File

Your guide to securing your **legacy**.

Life is unpredictable, but your estate planning doesn't have to be. **The Anchor Life File** is designed to help you organise, update, and record key financial and legal information, making it easier for you and your loved ones to manage your estate, both now and in the future.

This document is more than just a checklist—it's a roadmap for succession planning. Whether you are reviewing your will, tracking assets, or ensuring your estate is structured effectively, having all your information in one place simplifies the process for your family and executors.

<input type="radio"/>	Have you updated your ID, passport, or personal documents ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you changed your marital status or family structure ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Is your will up to date , and is your executor still the right choice?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you reviewed or changed your financial, legal, or tax advisors ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you updated your medical aid, hospital cover, or life insurance ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have there been any major health changes that affect your future plans?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you changed jobs, retired, or gained new qualifications ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you opened, closed, or updated any bank accounts or credit cards ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you bought, sold, or updated records of your investments or assets ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you reviewed your outstanding debts, loans, or financial obligations ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you made or changed any legal agreements, contracts, or leases ?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Are your online assets, accounts, and passwords recorded securely?	<input type="radio"/> Yes	<input type="radio"/> No
<input type="radio"/>	Have you documented your funeral wishes and end-of-life plans?	<input type="radio"/> Yes	<input type="radio"/> No

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Why is this important?

Estate planning is about more than wealth; it's about providing clarity, certainty, and security for those you leave behind. With **Anchor Succession**, we help you structure your financial affairs in a way that ensures a seamless transition while preserving your legacy.

This document serves as a guide to keeping your personal, legal, and financial matters in order, making it easier for your loved ones and executors to manage your estate when the time comes.

To ensure this document remains useful, it should be reviewed and updated regularly, stored safely, and used as a reference to keep track of key changes.

The **Anchor** Life File

Your Essential Document Checklist

Organising your key documents ensures a seamless estate process for you and your loved ones. Keep these records safe, up to date, and accessible to a trusted person.

Legal & Estate Documents

- Original last will and testament (local and offshore, if applicable)
- Letter of wishes
- Marriage certificate and antenuptial contract (if applicable)
- Divorce order and settlement agreement (if applicable)
- Death certificate of a predeceased spouse
- Trust deeds and trustee details

Personal Identification

- Identity document or passport
- Certified copies of spouse's ID/passport
- Birth certificates of dependants

Financial & Tax Records

- Banking details and account statements
- Credit agreements and loan documents
- Latest tax returns and tax number
- Pension/provident fund details

Insurance & Medical

- Life insurance, retirement annuities, and endowment policies
- Medical aid and gap cover details
- Disability or income replacement policies

Assets & Liabilities

- Title deeds of properties owned
- Share certificates or investment account details
- Vehicle registration documents and insurance policies
- Offshore investments and asset records
- Business ownership agreements (if applicable)

Other Important Information

- Details of digital assets (online accounts, passwords)
- Safe custody box details and access instructions
- Funeral and burial wishes

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Anchor Your Legacy

Keeping your key personal, financial, and legal details up to date is essential to estate planning. This section is designed to help you consolidate your most important information in a structured, easy-to-use format. The following few pages will guide you through:



A checklist to ensure you have all the necessary personal, financial, and estate-related documents in order.



Tables where you can fill in details such as identification records, banking and insurance information, and a list of assets.



A structured format that makes it easy to review and update your records regularly.

Use this section as a living document and review it annually or after any major life event to keep your information accurate and accessible. Doing so provides clarity and peace of mind for yourself and those managing your affairs.

My **Anchor** Life File

Personal Details

My key personal information recorded and up to date to ensure quick access when needed.

Checklist of Essential Personal Documents

- ☐ Birth certificate
- ☐ Identity document
- ☐ Passport
- ☐ Marriage certificate/antenuptial contract (if applicable)
- ☐ Divorce decree (if applicable)
- ☐ Living will/burial wishes
- ☐ Last will and testament
- ☐ List of professional contacts
- ☐ List of important personal contacts

Personal Information

Category	Details

Notes

My **Anchor** Life File

Education & Employment

My academic background and work history for financial, legal, and professional reference.

Checklist of Essential Documents

- ☐ Primary and secondary school certificates
- ☐ Tertiary education certificates
- ☐ Curriculum vitae (CV)
- ☐ Testimonials or reference letters
- ☐ Employment contracts
- ☐ Restraint of trade agreements (if applicable)

Education History

Qualification	Institution	Year Completed

Employment History

Employer	Position	Start Date	End Date

Notes

My **Anchor** Life File

Annual Renewals

My key policies, memberships, and subscriptions to avoid lapses in coverage and ensure continuity.

Licenses

- ☐ Driver's licence
- ☐ Vehicle licence
- ☐ Firearm licence (if applicable)

Insurance Policies

- ☐ Household and all-risk insurance
- ☐ Motor vehicle insurance
- ☐ Life insurance
- ☐ Disability cover/income replacement
- ☐ Professional indemnity insurance (if applicable)

Medical & Health Cover

- ☐ Medical aid details
- ☐ Gap cover
- ☐ Hospital plan
- ☐ Chronic medication records

Memberships & Associations

- ☐ Professional associations (e.g., legal, medical, engineering, etc.)
- ☐ Trade unions (if applicable)
- ☐ Clubs and gym memberships
- ☐ Religious or community organisations

Subscriptions & Services

- ☐ Newspapers, magazines, and periodicals
- ☐ Streaming services and entertainment
- ☐ Security services (e.g., alarm monitoring)
- ☐ UIF and other statutory contributions

For items that require regular renewal

Category	Renewal Date

Policy & Membership Details

Category	Type	Provider	Policy Number
Insurance	Household & All-Risk		
	Motor Vehicle		
	Personal/Family		
	Professional		
	Disability/Income protection		
Medical	Medical Aid		
	Hospital Plan		
	Gap Cover		

Notes

My Anchor Life File

Finance & Banking

My financial accounts, tax details, and key banking information in one place.

Essential Financial Documents

- ☐ Bank account details
- ☐ Credit card details
- ☐ Tax returns and tax number
- ☐ Personal balance sheet/net worth statement
- ☐ Contact details for financial advisor/accountant

Banking & Tax Information

Category	Institution	Account/Reference No.
Bank Account(s)		
Credit Card(s)		
Home Loan		
Other Loans/Obligations		
Tax Details		

Notes

My **Anchor** Life File

Life Policies, Retirement & Investments

My key financial protections and investment holdings to ensure that all of my assets are structured for long-term security and estate planning.

Essential Documents

- ☐ Life insurance policies (local & offshore, if applicable)
- ☐ Pension or provident fund details
- ☐ Retirement annuities
- ☐ Endowment policies
- ☐ Share portfolio records (certificates or scrip account details)
- ☐ Unit trust investment statements
- ☐ Business interests (company shares, directorships, or partnerships)
- ☐ Trust fund documents (if applicable)

Policy & Retirement Details

Category	Provider/Institution	Policy/Investment No.	Type (e.g., Endowment, RA, Shares, Unit Trusts, etc.)
Life Insurance(s)			
Pension/Provident Fund(s)			
Retirement Annuity			
Endowment Policy			
Share Portfolio(s)			
Unit Trust(s)			
Business Interests			

My **Anchor** Life File

Assets & Valuables

Keeping track of my key assets, valuables, and sentimental items to ensure they are correctly accounted for and distributed according to my wishes.

Essential Documents

- ☐ Property details and title deeds
- ☐ Vehicle registration documents
- ☐ Safe custody box details and location
- ☐ Offshore investments and asset records
- ☐ High-value personal items (e.g., jewellery, artwork, collectables)
- ☐ List of sentimental items and their intended recipients

Assets & Valuables

Category	Details (description, location, etc.)

Notes

My **Anchor** Life File

Important Numbers & Passwords

A record of my key identification numbers and secure login details to ensure they are accessible when needed.

Essential Information

- ☐ ID and passport numbers
- ☐ Driver's licence number
- ☐ Medical aid details
- ☐ Income tax number
- ☐ Banking PINs and online banking details
- ☐ Computer, phone, and other device passwords
- ☐ Email and social media logins
- ☐ Safe custody box access details
- ☐ Any other secure accounts or PINs

Secure Information

Category	Number/Username/Login Details & Passwords
ID Number	
Passport Number	
Online Tax or SARS Portal	
Bank PINs (stored securely)	
Online Banking	
Computer/Device Passwords	
Email & Social Media	
Other Secure Accounts	

Security note: Ensure this document is **stored in a highly secure location** and only shared with a trusted person.

My **Anchor** Life File

Notifying Loved Ones & Advisors

A list of the key people who should be contacted in the event of my passing. Please ensure important individuals are notified promptly and can assist with my estate process.

Checklist of Important Contacts

- ☐ Immediate family members (spouse, children, parents, siblings)
- ☐ Close friends or personal representatives
- ☐ Executor of your estate
- ☐ Wealth manager/financial advisor
- ☐ Accountant
- ☐ Attorney/legal representative
- ☐ Employer/business partners
- ☐ Religious or community contacts (if applicable)

People to be Notified

Name	Relationship	Contact No.	E-mail

My Anchor Life File

Pets & Their Needs

To ensure my pets are taken care of by outlining their needs and preferred arrangements.

Checklist of Essential Pet Information

- ☐ Pet names and species
- ☐ Vet contact details
- ☐ Medical history and vaccination records
- ☐ Special dietary needs
- ☐ Daily care instructions
- ☐ Arrangements for rehoming (if applicable)

Pet Care & Rehoming

Name & Species/Breed	Vet & Contact Details	Diet & Care Needs	Rehoming Plan

Notes

My Anchor Life File

Legal & Trust Documents

My key legal records and trust details to ensure my estate is well-structured and legally protected.

Checklist of Essential Documents

- ☐ Copies of legal agreements (contracts, property deeds, business agreements)
- ☐ Power of attorney documents
- ☐ Guardianship instructions (if applicable)
- ☐ Trust deeds and trustee details
- ☐ Contact details for legal representatives
- ☐ Any other important legal documents

Trust & Legal Documents

Details & Preferences	Location	Custodian
Power of Attorney		
Guardianship Instructions		
Trust Deed & Trustee Details		
Property Deeds		
Business Agreements		
Other Legal Documents		

Notes



I, _____
confirm that the details provided in this document are accurate to the best of my knowledge. I
understand that this document is for reference purposes and does not replace any legally binding
will or estate planning documents.

Signed at _____ on this _____ day of _____ 20 _____

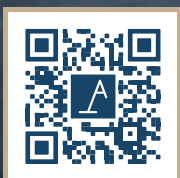
Full Name(s) and Surname _____

Signature _____

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anchorcapital.co.za | invest@anchorcapital.co.za

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