







LEGAL FEES AND ASSOCIATED COSTS APPLICABLE AT DEATH

Thank you for choosing us to assist you with drafting a Last Will and Testament. Remember to email a copy of your finalised and signed Will to us to validate. We also recommend that you send us a second original copy to keep in our vault, until it is needed.

At the time of death, there are certain legal fees and costs that are unavoidable. Over and above this, the cash in your Estate will be unavailable to your family, for every day expenses, while your Estate is being wound up.

Below is a list of fees and expenses your family can expect to pay when you pass away. Please take note of all the fees that may be applicable upon your death and which will ultimately affect your family or other Beneficiary(ies).

 <p>IMMEDIATE EXPENSES Funeral costs which could include travel and catering costs, as well as other expenses.</p>	 <p>SHORT-TERM EXPENSES Medical Aid, school fees, household and car insurance, electricity, etc.</p>	 <p>LEGAL FEES Executor's fees, Master's Fees, Correspondence Fees, Clearance Fees, Advertisement Costs</p>	 <p>CONVEYANCE ATTORNEY FEES (only applicable if you have a property/ies).</p>	 <p>TRUSTEE FEES (only applicable if you are creating a Testamentary Trust/s in your Will).</p>	 <p>INHERITANCE TAX Capital Gains Tax and/or Estate Duty may be applicable to your Estate.</p>
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WE HAVE TWO OPTIONS TO COVER YOU AND YOUR FAMILY AGAINST SOME OR ALL OF THESE COSTS.

Option 1

1

You can rely on our discounted fees to administer your Estate, which also includes the use of lowest asset values in the final Estate accounts.
Note: Our fee structure may change from time to time.

Option 2

2

You can opt to take a **Legacy Protection Plan™** that covers 100% of your legal fees and the associated costs, for a nominal monthly premium. The **Legacy Protection Plan™** is an innovative insurance offering that complements your **Will** and covers your legal fees and other costs associated with dying, it contributes towards immediate expenses you may have and provides financial provision for the monthly expenses your family has, such as medical aid, school fees, etc. which need to be paid while your Estate is being wound up. We recommend that every Client who qualifies to receive this benefit, should have their real cost of dying calculated to avoid financial strain on their family and loved ones at the time of their passing away. This calculation is done using the Legacy BluePrint Planner™.

PLEASE DISCUSS THESE OPTIONS WITH YOUR FINANCIAL ADVISOR TO ENSURE THAT THERE ARE NO SURPRISES FOR YOUR LOVED ONES WHO ARE LEFT BEHIND WHEN YOU PASS AWAY.
ALTERNATIVELY, TO BOOK A CONSULTATION WITH ONE OF OUR TESTAMENTARY CONSULTANTS, PLEASE SEND AN EMAIL TO LIFEINFO@CAPITALLEGACY.CO.ZA.

