



TEMPLE ALLIANCE

TEMPLE ALLIANCE (PTY) LTD

Life Folder

*Household, personal, financial and estate information
Private and Confidential*

This document is a confidential record of your household, personal, financial and estate information. It is compiled to guide your family and Temple Alliance in the event of an emergency, and should be kept up to date and stored securely at all times.

PRINT AND COMPLETE BY HAND — KEEP THE HARD COPY ONLY

Do not save, email or photograph this document once it contains your details.

HOUSEHOLD DETAILS

Full name:

Date completed:

Date last updated:

Where the Family Financial File is kept:

Private & Confidential — store somewhere secure, and tell your next-of-kin where it is.

BEFORE YOU BEGIN

Read this first

Keep this as a printed hard copy only

This folder records logins, PINs and access codes. Complete it **by hand on the printed pages**. Do not save it on a computer or phone, email it, upload it or photograph it. Store it somewhere secure — such as a home safe or a safety deposit box — and tell your next-of-kin where it is.

What the Life Folder is. It is a confidential record of your household, personal, financial and estate information, compiled to guide your family and Temple Alliance in the event of an emergency. It should be kept up to date and stored securely at all times.

How it works with your Family Financial File. The Family Financial File is the overview — your family, children's care, income, debts, insurance and wishes — and contains no passwords, so it can be completed and shared electronically. This Life Folder is the confidential detail, including every login and code. **If you have children who are financially or physically dependent on you, complete both, even where the details repeat** (your Will, executor, advisers, accounts and insurance): the two files are likely to be reached at different times and by different people, so each must stand on its own.

How to complete it

Write clearly, in pen and block capitals. Write "N/A" against anything that does not apply, so a blank is never mistaken for something missed.

Two-parent households: use the spouse / partner columns and section provided, and make sure each parent knows where this folder is kept.

Out of space? Use Addendum B and note which section the entry relates to.

Keep it current. Review it at least once a year and whenever a password, code, account or provider changes. When you complete a new version, mark the old copy as no longer the latest (see Addendum C) and **shred it** — do not simply throw it away, and do not post it.

Safekeeping. Allow Temple Alliance (Pty) Ltd to hold your original Will. If you would like, we are happy to attach your Family Financial File to your Will and store them together in our offices. Tell your next-of-kin where this Life Folder and your other original documents are kept.

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SECTION 01

Personal details

Name	
Middle Name	
Surname	
Maiden Name / Previous Name	
SA ID Number / Foreigner Date of Birth	
Nationality	
Home Telephone Number	
Work Telephone Number	
Mobile Number	
Email Address (Work)	
Email Address (Private)	
SA Income Tax Number	
SARS E-Filing Login Details	
Will Held By (Person / Company Name & Contact No.)	
Nominated Executor(s) in Will & Contact Details	
Living Will Held By (Person / Company Name & Contact)	

Marital status

Tick the applicable option(s) and complete the relevant date(s).

☐ Unmarried	☐ Divorced — Date: _____
☐ Married In Community of Property — Date: _____	☐ Married Out of Community of Property — Date: _____
☐ With Accrual — Date: _____	☐ Without Accrual — Date: _____
☐ Antenuptial Contract No.: _____	☐ Married I.T.O. Muslim / Hindu Rites — Date: _____
☐ Customary Marriage — Date: _____	☐ Foreign Marriage (Country & Date): _____
☐ Civil Partnership — Date: _____	

SECTION 02

Spouse / partner details

Name	
Middle Name	
Surname	
SA ID Number / Foreigner Date of Birth	
Nationality	
Home Telephone Number	
Work Telephone Number	
Mobile Telephone Number	
Email Address	

SECTION 03

Children's details

List each child individually below.

NAME OF CHILD	ID NUMBER / DATE OF BIRTH	CONTACT NUMBER	EMAIL ADDRESS	HOME ADDRESS

SECTION 04

Emergency contact persons / next of kin

NAME	RELATIONSHIP	TELEPHONE NUMBER & EMAIL ADDRESS

SECTION 05

Domestic worker / gardener / nanny

NAME OF STAFF MEMBER	CONTACT NUMBER & EMAIL ADDRESS

SECTION 06

Home services providers

	NAME & COMPANY	TELEPHONE NUMBER & EMAIL ADDRESS
Electrician		
Plumber		
Home Alarm Technician		
Handy Man		
Other		

SECTION 07

Security information

Armed Response Company	
Contact Person(s) & Telephone Number	
Home Alarm Code	
Home Alarm Administrator's Code	
Home Alarm Password	
Safety Deposit Box No. & Location	
Home Safe Code & Location	
Home Safe Key Location	
Home Access Control Codes	
Location of Spare Remote Controls	

SECTION 08

Professional services providers

	NAME	COMPANY	TELEPHONE NUMBER & EMAIL ADDRESS
Attorney			
Accountant / Bookkeeper			
Financial Advisor			
Insurance Broker			
Doctor			
Medical Aid Broker			
Private Banker			

SECTION 09

Employment information

	YOU	SPOUSE / PARTNER
Company Name		
Contact Person(s)		
Contact Telephone Number		
Employee Number		

SECTION 10

Medical information

	YOU	SPOUSE / PARTNER
Name of Medical Aid Company		
Plan Option		
Medical Aid Number		
Online Username		
Online Password		
Blood Group		
Organ Donor (Yes / No)		
Gap Cover Policy Number		

SECTION 11

Pet information

	PET 1	PET 2	PET 3
Pet Type			
Pet Name(s)			
Vet Name			
Vet Contact Telephone Number			
Pet Insurance Details			

SECTION 12

Mobile phone information

	PHONE 1	PHONE 2
Phone Number		
PIN Number		
Phone IMEI (15 digit number)		
PUK		
Mobile Phone Contract Holder		

SECTION 13

Digital information

PLATFORM	USERNAME	PASSWORD
Laptop		
Tablet / iPad		
Facebook		
X (Twitter)		
Instagram		
TikTok		
LinkedIn		
Pinterest		
Cloud Services		
Other		
Other		

SECTION 14

Accounts and subscriptions

DETAIL	COMPANY NAME	ACCOUNT / REFERENCE NO.
Internet Service Provider		
Fibre Service Provider		
DSTV		
TV Licence Number		
Netflix		
Apple TV		
Disney+		
Amazon Prime		
Other Streaming		
Gym Membership		
Landline Telephone Number		
Retailer Account (e.g. Woolworths)		
Subscriptions / Debit Order		
Subscriptions / Debit Order		
Other		

SECTION 15

Financial information

	COMPANY & CONTACT NAME	TELEPHONE NUMBER & EMAIL ADDRESS	POLICY / REF NO.
Life Cover			
Funeral Cover			
Household Insurance			
Personal Loan			
Pension Fund			
Provident Fund			
Annuity			
Discretionary Investments			
Offshore Investments			
Shares			
Other			

SECTION 16

Immovable properties

ADDRESS	ERF NO.	HOME LOAN BANK & ACCOUNT NO. / TITLE DEED HELD BY

SECTION 17

Bank account information

	BANK 1	BANK 2	BANK 3	BANK 4
Name of Bank				
Account Holder Name				
Account Type				
Account Number				
Online Banking Username				
Online Banking Password				

SECTION 18

Motor vehicle(s)

	VEHICLE 1	VEHICLE 2
Make & Model		
Registration Number		
VIN Number		
Location of Vehicle		
Vehicle Licence Due Date		
Registration Papers Held By		
Service Book Location		
Financed By — Company		
Financed By — Contact Number		
Financed By — Reference Number		
Insurance — Company		
Insurance — Contact Number		
Insurance — Reference Number		
Car Keys and Spares Held At		
Garage Remotes Held At		

SECTION 19

Firearms

	FIREARM 1	FIREARM 2	FIREARM 3
Make and Serial Number			
Licence Safekeeping Address			
Ammunition Safekeeping Address & Contact Name			

SECTION 20

Other movable assets and valuables

Collections, jewellery, crypto assets and anything else of value.

DESCRIPTION	SAFEKEEPING ADDRESS & CONTACT INFO

Crypto assets

DESCRIPTION — CRYPTO DETAILS	INFORMATION AND PASSCODES TO RETRIEVE

SECTION 21

Interest in companies / close corporations / trusts

	ENTITY 1	ENTITY 2	ENTITY 3
Name & Registration No. of Legal Entity			
Contact Person Name and Details			
Type of Interest (Director, Member, Trustee, Shareholder, Beneficiary)			

ADDENDUM A

Additional bank accounts

Use this page to record any bank accounts beyond the four listed in Section 17.

NAME OF BANK	ACCOUNT HOLDER NAME	ACCOUNT TYPE	ACCOUNT NUMBER	USERNAME	PASSWORD

ADDENDUM B

Overflow / additional items

Use this table for extra properties, vehicles, firearms, valuables, accounts or other items that did not fit in the sections above. Note which section each entry relates to.

RELATES TO SECTION	DESCRIPTION	DETAILS / REFERENCE NO.

ADDENDUM C

Notes and version check

Use the lines below for any additional information not covered elsewhere in this document.

■ Is this the latest version?

If the box below is not ticked, we will assume this is the newest version.

☐ No — a newer version has been completed (please complete the details below).

Date of the newer version

Where the newer version is kept

What changed in the newer version

Replacing an older version

Do not simply throw away an older version of this folder — it contains sensitive information. Please **shred** it. If you do not have access to a shredder, bring it to us at Temple Alliance and we will shred it for you. **Do not post it** — bring it to us in person.

Due to the sensitive nature of this information

Allow Temple Alliance (Pty) Ltd to hold your original Will. If you would like us to attach your Family Financial File to your Will, we are happy to store them together in our offices.

Remember to advise your next-of-kin where this Life Folder and your original documents are held in safekeeping.

For assistance, contact us at admin@templealliance.co.za or 021 657 3940.