



LEADERSHIP IN BUSINESS THROUGH
EMPOWERMENT AND COLLABORATION

Business Succession Information to include in Personal Info File in the case of death to assist your family

- Full name /ID /Tax No/Passport No
- Parents info (required for estate)
- Marriage info (Married ANC/COP)
- Spouse Details – Name /ID / Income tax
- Children details – Name /ID /Income Tax
- Name of all entities – shareholding /Business ownership/trusts
- Estate planning/ Buy /Sell agreement /Key man policies
- Agreement with executor/attorney in terms of fees
- Location of all original documents – list – Will /Title deeds/ID /Passport /Marriage cert/contract/Vehicle log books/tax info/sureties signed/Liabilities /Safety deposit box
- List of Personal Advisers and contact details ie:-
- Accountant /Attorney /Banker/Insurance Broker/Executor
- Religious Leader
- Detail list of Assets and Liabilities -update regularly
- Details of insurance Policies /Retirement Annuity/and beneficiaries
- Current Employer details
- Membership of any clubs/professional associations/gym etc
- Credit Card /Debit card details
- Utilities -details Electricity /Landline/cell phone -
- Social Media – eg Whatsapp/Linkedin /Facebook /instagram/telegram etc email address/website -details user name account # password
- Laptop/Computer/cellphone – login details – Software details
- Loyalty programs -frequent traveller / loyalty cards – user name and passwords
- Bank Accounts details log in details(encrypt)
- Burial requests eg cemetery /last rites/ Bequests and charities
- Family must all be aware of personal info file in the event of death /accident/illness

This list may be added to and is not exhaustive.

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