**Kliënt inligting/ Client information**

Van/ Surname: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Titel/ Title: \_\_\_\_\_\_\_

Volle Name/ Full Names: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ID No: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Geslag/ Gender M / F

Woonadres/ Res Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Posadres/ Postal Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Kontak besonderhede/ Contact detail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Eggenoot/ Spouse/ Partner:**

Van/ Surname: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Titel/ Title: \_\_\_\_\_\_\_

Volle Name/ Full Names: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Geslag/Gender M / F

Nooiensvan/ Maiden Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Huweliks status en datum\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Kinders/ Children:**

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| Naam/Name | Geb dat/ DOB | M/F |
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Beroep/ Occupation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Kwalifikasie/ Qualification: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Inkomste/ Income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Roker/ Smoker: Y / N

Part-time/other activities: Have you in the past participated in, do you currently participate in or do you intend in the future to participate in, any hobbies/ activities that could be hazardous in any way, for example, flying/gliding activities, diving, professional sports, motorsport, bungy jumping or any other hobby/activity with a risk of accidents and/or risk to health? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Admin

Travel

Manual

Supervisory

**Bates en Laste/ Assets & Liabilities:**

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| Beskrywing/ Description | Bates/ Assets | Laste/ Liabilities | Realised/spouse/fixed |
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**Behoeftes/ Needs:**

**Boedel/ Estate:**

* **Kapitaal/ Capital:**

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* **Inkomste/ Income:**

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**Ongeskiktheid/ Disability:**

* **Kapitaal/ Capital**

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* **Inkomste/ Income**

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**Aftrede/ Retirement:**

* **Kapitaal/ Capital**

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* **Inkomste/ Income**

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**Kontantvloei/ Cash Flow:**

 **Inkomste/ Income**

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 **Uitgawes/ Expenses**

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**Belasting/ Tax**

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**Notas/ Notes**

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**Medies/ Medical:**

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**Korttermyn versekering/ Short term insurance:**

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**Sake belange/ Business interests:**

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| Beskrywing/ Description | Bates/ Assets | Laste/ Liabilities |
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**Boedel wense/ Estate wishes:**

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**Finansiële doelwitte/ Financial goals:**

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**Kliënt/ Client** **Datum/ Date**