Practical guide

What to prepare when reporting a deceased estate

When reporting a deceased estate to the Master of the High Court, certain documents and information are typically required to enable the Master to assess the estate and issue the appropriate letters of authority. Preparing these documents in advance can assist in avoiding delays or rejection of the estate file.

Generally, the following will be required: the original or a certified copy of the deceased's death certificate, the deceased's identity document, and details of the deceased's last residential address. Where a will exists, the original will and any codicils must be submitted. If there is no will, supporting affidavits confirming the heirs and family structure are usually required.

An inventory reflecting the assets and liabilities of the estate must be prepared, together with information relating to any immovable property, bank accounts, policies, investments, or outstanding debts. Details of the surviving spouse, children, or other heirs are also commonly required, including identity documents and contact details.

In addition, the nominated executor or estate representative is generally required to complete an acceptance of trust or undertaking, together with any prescribed affidavits required by the Master's Office.

Where the value of the estate exceeds R250 000, professional assistance is strongly recommended. Estates above this threshold often involve more complex reporting requirements, closer scrutiny by the Master's Office, and a higher risk of procedural error if not handled correctly. In such cases, affected parties are encouraged to contact a legal professional for guidance. ND Attorneys is able to assist with the reporting and administration of deceased estates where professional intervention is required.

Estate reporting requirements may differ depending on the value of the estate, the existence of a will, and whether the estate qualifies as a full estate or a section 18(3) estate. Incorrect or incomplete documentation may result in delays, additional costs, or complications for heirs and beneficiaries.