

# An executable will

Document your wishes in your will, and have a financial plan to safeguard your family's financial future when you're no longer around

If you have a financial plan,  
your will makes sure that



and



**You dedicate your life to make sure that your family and their needs are taken care of.  
When you are no longer around, having a will means that your wishes about what you want to leave behind have been documented and can be carried out.**

It will be rewarding to know that your legacy is on paper, and that your loved ones will be looked after in the way you wanted them to be, because you planned with your financial adviser.

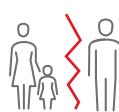
Approximately 86% of South Africans don't have wills. A will is one of your most important documents because it expresses your wishes after your death. In addition to who should receive what - your house, other properties, money in the bank and any savings or investments, it also gives clear instructions on what has to happen to your assets or money to avoid unnecessary financial difficulties for your family.

## A professionally drafted will to support your family

Momentum Trust will:

- set up and administer trust(s) if needed for your assets;
- help you with specialised estate planning for offshore assets;
- help you address risks if you're a business owner; and
- act as executor, or as an agent to work with a family member or friend who has been nominated as executor.

The wording will be clear and not open to interpretation, and your family will benefit in the following ways:



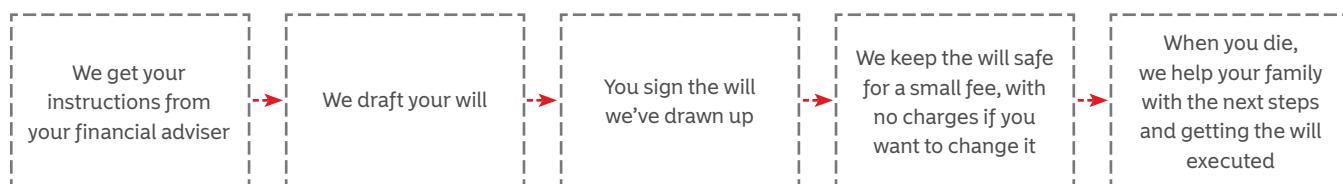
A trust could be created for your children, their education, and other needs

Your marital dispensation or divorce agreement will be taken into account

Your tax obligations in your estate will be covered if you've planned for this with your financial adviser

## Provide for your family, get a will from Momentum

Your will is the cornerstone of your financial and estate planning, and contributes to your journey to success.



Momentum Trust is a leading provider of wills and trust services in South Africa, with extensive experience of working with financial advisers to make sure that our services align with your needs and your legacy.

Momentum and Momentum Trust take all reasonable measures to make sure that the information and opinions in this document are up to date and correct, but do not offer any direct or indirect guarantee. The information in this document can change without us notifying you. It is an information tool and should not be seen as professional advice, nor is it contractually binding. The terms and conditions of the policy contract will apply in all instances. When dealing with financial products you should seek professional advice from an authorised, accredited financial adviser.