

# An executable will

Make sure that you have a plan to manage your finances, and a will so that your family and business can continue without you

When you're no longer around, your financial plan and your will ensures that



**As a business owner, you spend a great deal of time establishing and operating your business because it is a source of income for you and your family.**

To make sure that your business keeps running and your family is financially well when you are no longer around, you need a financial plan to make sure that there is enough money when you are no longer around, and a will, so that your wishes are documented and fulfilled.

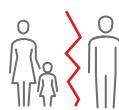
A will is important because it expresses your wishes after your death. In addition to who should receive what - your house, other properties, money in the bank and any savings or investments, it also gives clear instructions on what has to happen to your assets or money to avoid unnecessary financial difficulties for your family and for your business' continuity.

## A professionally drafted will for financial continuity

Momentum Trust will help you address risks if you're a business owner, with:

- setting up and administering trust(s), if needed for your assets;
- specialised estate planning for offshore assets;
- acting 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:



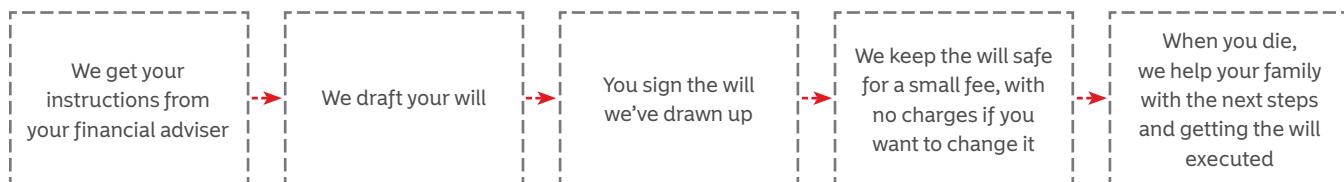
A trust could be created for your children, their education, and other needs

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

## Get a will and give your family and business continuity 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.

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