CAPITAL LEGACY IN A NUTSHELL

CAPITAL LEGACY™ leave a legacy

WHAT WE OFFER

CONSULTATION

- UNLIMITED AMENDMENTS → LAST WILL & TESTAMENT ← SAFE CUSTODY — NO COST
- CALCULATE → IDENTIFY NEEDS → IDENTIFY SHORTFALL → LEGACY BLUEPRINT™ ← EDUCATE ← SUGGEST SOLUTIONS — NO COST
- LEGACY PROTECTION PLAN™ ← COVERS NEEDS & SHORTFALLS — OPTIONAL MINIMAL MONTHLY PREMIUM

WHEN YOU PASS AWAY

SERVICES & NEEDS	FEES & EXPENSES	SOLUTIONS
ESTATE ADMINISTRATION	• Executor Appointment • Other Asset Administration • Estate Property Transfers • Trustee Appointment	LEGACY SERVICES™
LEGAL FEES	• Executor's Fees • Non-Estate Assets Fees • Conveyance Fees • Ongoing Trustee Fees	INDEMNITY PLAN™
BENEFICIARIES / LOVED ONES NEED CASH	• Cash payment • 48 hour after death	IMMEDIATE LIQUIDITY BENEFITS™
INITIAL ESTATE EXPENSES	• Masters Fee • Correspondents • Advertising • Property Clearance	ESTATE OVERHEADS PROTECTOR BENEFITS™
ONGOING ESTATE EXPENSES	• School Fees • Water & Lights • Insurances • Medical Aid • Groceries	ESTATE OVERHEADS PROTECTOR BENEFITS™
BOTH SPOUSES PASS AWAY	• Inheritance Taxes • Estate Duty Tax • Capital Gains Tax	ESTATE GAP COVER BENEFITS™

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Capital Legacy Solutions (Pty) Ltd is an Authorised Financial Services Provider, and is underwritten by Guardrisk Life Ltd, a subsidiary of MMI Holdings Ltd.