LEGACY SERVICES™

CAPITAL LEGACY™
leave a legacy

LEGACY PROTECTION PLAN™

None of us like to think about death, but you can plan for it to ensure your loved ones are taken care of when you're gone. Our unique, first-to-market Legacy Protection Plan™ is a complete solution that accompanies your Will and indemnifies you and your loved ones from the inevitable fees associated with dying. What's more, the Legacy Protection Plan™ offers you and your loved ones protection from various other expenses that arise when you pass away and are often forgotten or overlooked and which can be burdensome on the people you love.

By consulting with one of our Testamentary Consultants to draft your Last Will and Testament and calculate your real cost of dying through our innovative Legacy Blueprint Planner™, you could completely indemnify your loved ones against all the legal fees and cover the expenses that arise when you pass away.

Give your family and loved ones peace of mind that everything has been taken care of and no unforeseen fees and expenses will creep in during a very difficult time.

LEGACY SERVICES™

Our Legacy Services™ are the essential, convenient and professional services we provide to all our Plan holders in respect of Wills, Estates and Trust administration. Each Estate that needs to be administered in South Africa incurs legal and administrative fees from these services. These administrative services attract Executor, Conveyance, Trust and non-estate administration fees.

With all the right professionals under one roof, we are able to provide these essential services in a convenient and professional manner. When securing the correct Legacy Protection Plan™, all these Legacy Services can be adequately indemnified to protect the legacy you intend to leave to your Beneficiaries.

- Will
- Estate
- Trusts

INDEMNITY PLAN™

A unique all-in-one solution that indemnifies and protects you from the administrative fees specified under the Legacy Services™ to ensure there are no hidden fees. Depending on your Plan selection, you may receive further integrated benefits such as: Immediate Liquidity™; Estate Overheads™; and Estate Gap Cover™, to cover further unforeseen expenses that are often overlooked.

- CorePlan™
- FeePlan™ Lite & Classic
- Bronze
- Silver
- Gold
- Platinum
- Diamond
- Unlimited
- *MyPro*™

IMMEDIATE LIQUIDITY™

When you pass away, your family could have limited access to money. Ensure there is money available to cater for things such as funeral expenses, travel arrangements, groceries and other immediate expenses. This benefit seamlessly protects not only yourself, but your Spouse, Children and Parents too.

- Principal - Lite
- Principal - Classic
- Principal - Premium
- Family - Lite
- Family - Classic
- Additional Child
- Parent

ESTATE OVERHEADS PROTECTOR™

Estates take time to wrap up and in the meantime your family has numerous accounts and monthly expenses to pay. This benefit will keep the lights on, pay the medical aid, pay the school fees, pay for groceries and cover the insurance. Through the Executor, accounts are paid directly to the provider, every month, for up to 6 months.

- Principal - Lite
- Principal - Classic
- Principal - Premium

ESTATE GAP COVER™

If both you and your Spouse should pass away, it can be a financial shock to your Beneficiaries. It's often too expensive to cover the costs associated with both Spouses passing away simultaneously. Through this benefit, you can provide for inheritance taxes and other additional legal costs as well as the loss of a monthly income.

- Joint Life - Lite
- Joint Life - Classic
- Joint Life - Premium

LEGACY SERVICES™

Our Legacy Services™ are the essential, convenient and professional services we provide to all our Plan holders in respect of Wills, Estates and Trust Administration.

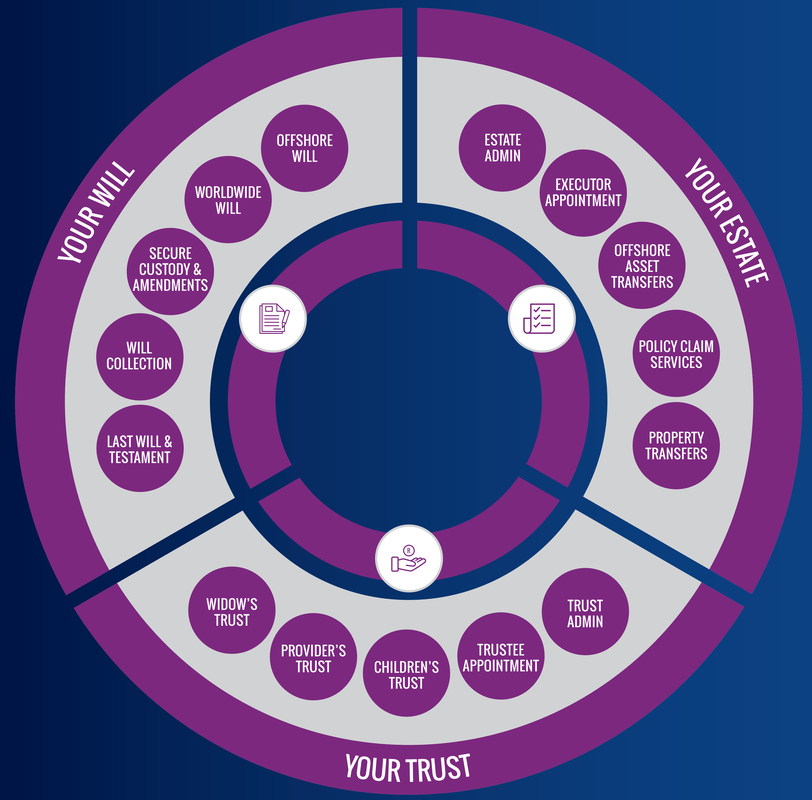
We make the process of Will-drafting extremely convenient, to meet all your needs, including worldwide services. There is no initial fee for this service and no charge for amendments, Will collection and safe custody.

We alleviate all the pressure your family may experience when a loved one passes away. Our Estates are wound up within 6-9 months. We also harness a unique Relationship Model to enhance communication during this difficult time.

We provide professional, expert advice with regards to Trust Administration. Our experts help you navigate the complexities of Estate, tax and succession planning. We offer various purpose-driven Trusts to find the best-suited solution for you.

With all the right professionals under one roof, we are able to provide these essential services in a convenient and professional manner. When you secure the correct Legacy Protection Plan™, all these Legacy Services™ can be adequately indemnified to protect the legacy you intend to leave to your Beneficiaries.

Convenient, professional and essential Legacy Services™ all under one roof.



GUARDRISK
TAILORED RISK SOLUTIONS

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