

The HelloMoneypenny *guide*

Getting your affairs in order

To help clients bring order, clarity and calm to one of life's most important – and often postponed – tasks. This guide outlines the key categories and types of information a Moneypenny can help organise and maintain.

When something unexpected happens, families are left not only with emotion but with administration. From bank accounts to birth certificates, from passwords to policies – someone has to find it all.

Getting your affairs in order isn't a morbid exercise; it's an act of kindness to those you love. It's about ensuring that everything important is accessible, current and easy to manage – today, and in the future.

How HelloMoneypenny can help

Organising this level of information takes time, patience and sensitivity. Your Moneypenny acts as a calm, professional project partner:



1 Creating a secure physical and digital filing system

2 Gathering and certifying copies where required

3 Liaising with trusted advisers (lawyers, brokers, accountants)

4 Updating and maintaining your file annually

You remain *in control*

Your Moneypenny simply ensures that everything is complete, current and beautifully in order.

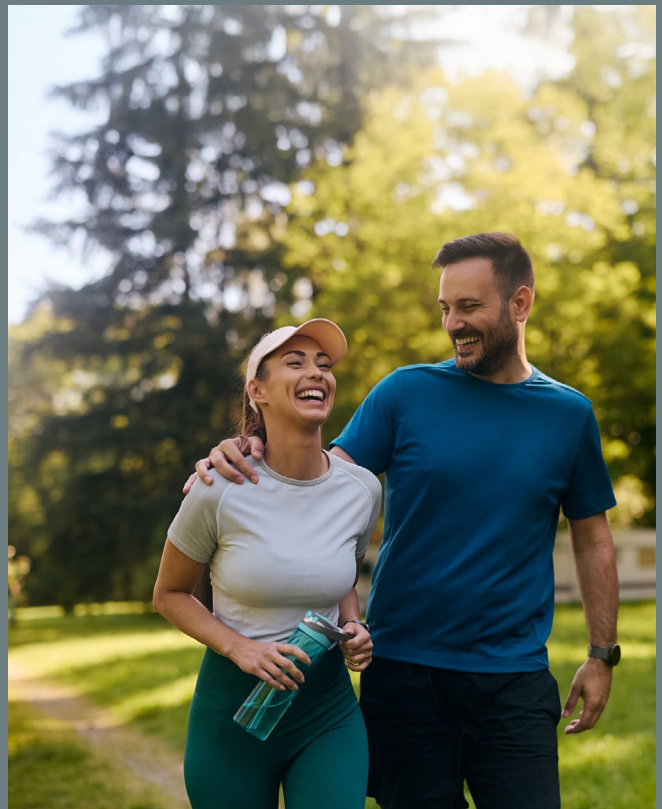
What's in an *"Affairs in order"* file?

01 Personal and identity essentials

- Certified copies of IDs, passports and driver's licences
- Birth, marriage or divorce certificates
- Medical aid cards
- Emergency contact list (family, doctor, lawyer, executor etc.)
- Secure record of passwords and PINs (digital vault or password manager)

02 Legal and financial foundation

- Valid, updated will and executor details
- Power of attorney or guardianship documentation
- Tax information (SARS logins, accountant contact)
- Bank, investment and loan account details
- Property deeds, lease agreements and vehicle papers
- Business ownership documents (if applicable)



03 Insurance and protection

- Life and short-term insurance policies (with policy numbers and contacts)
- Medical and gap cover
- Education, pension or retirement funds
- Pet insurance and caregiver arrangements

04 Household and daily living

- Details of utilities, subscriptions and recurring debit orders
- Household staff information and payroll records
- Contact details for key suppliers (security, gardener, cleaner, pool service)
- Copies of proof of residence documents

05 Personal wishes and legacy

- Letters or notes for loved ones
- Organ donor or living-will preferences
- Funeral or memorial guidance
- Location of sentimental items or keepsakes



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assistants. *for everyone.*