

## **Streamlining estate planning in South Africa with innovative technology**

Estate planning and the ensuing execution of those plans are of vital importance in South Africa, especially during Wills Week. However, settling a deceased estate, depending on its intricacy and adherence to legal standards, can span from a few months to several years. The weight of this duty often falls on professional executors, who must not only handle legal technicalities but also the sensitive nature of bereavement.

Sameer Kumandan, Managing Director at [SearchWorks](#), South Africa's most innovative data aggregation platform, says they can improve accuracy with the drafting of a will and help to find the required documents and information needed for the execution of the will. "Estate planners or administrators have access to 160 different search types, covering more than 20 data suppliers to find, verify and pre-populate the information of their client in order to settle the final details of a deceased person's estate."

Professional executors typically require ID verification, lineage confirmation, property ownership and valuation details as well as vehicle owner and valuation information. In more complex estates, where the deceased has no will or it is outdated, there is a risk that valuable assets may be inadvertently omitted from the estate planning and execution process. "In these instances, the need for executors to receive accurate confirmation of all details in order to expedite turnaround times of closing down accounts and transferring assets is paramount," notes Kumandan.

Sometimes, however, gaining access to this information is easier said than done. In addition, professionals need information obtained within the remit of the law, aligning with the National Credit Regulator and in compliance with POPI regulations. "A single search via SearchWorks can reveal valuable information, relieving professionals from long hours of checking and cross-checking multiple data sources. Given delays at the Master of the High Court's offices SearchWorks impacts positively on turnaround times and the confirmation of key details and information," he says.

With an all-in-one platform, SearchWorks provides a comprehensive solution to estate planning and execution by integrating data aggregation, verification, and document retrieval. This efficient system not only minimises emotional distress by reducing delays and challenges in document retrieval but also allows families the space to focus on healing and remembrance. By streamlining the estate planning process, SearchWorks plays a pivotal role in preserving an individual's legacy, ensuring that their final wishes are executed with accuracy and providing peace of mind to both planners and beneficiaries.

At its core, SearchWorks alleviates much of the anguish surrounding the loss of a loved one by ensuring the estate planning process is efficient and free from undue delays. As Kumandan notes, "There's no justification for the trauma of losing a loved one to be exacerbated due to bureaucratic delays or missing documents."

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