

WE ARE NOT A WILL DRAFTER.  
WE ARE A LEGACY INFRASTRUCTURE COMPANY.



Scan Me



# HOUSE OF HEIRS

## FIDUCIARY SERVICES

### Our Profile

Edition 2026

#### INSIDE THIS EDITION

- The Future of Digital Estate Administration
- How HeirsControl™ is Transforming Estate Management
- The Secure HEIRSVault™ Document Protection System
- The Rise of Smart Estate Planning Platforms
- How Brokers Can Build Recurring Estate Revenue

Legacy. Structure. Continuity.

*This material is intended for general informational purposes regarding the services of House of Heirs. Estate planning solutions should be considered in light of individual circumstances and applicable legal requirements.*

[www.houseofheirs.co.za](http://www.houseofheirs.co.za)

# Estate Administration. Re-engineered.

## Who are we?

**CLARITY FOR FAMILIES. CAPACITY FOR FIRMS.  
CONFIDENCE IN EXECUTION**

House of Heirs Fiduciary Services is a technology-enabled fiduciary and estate execution firm designed to simplify estate administration, reduce delays, and protect families during life's most difficult transitions.

**We combine professional fiduciary expertise with intelligent systems to ensure estates are planned clearly, documented properly, and executed efficiently with full transparency at every stage.**

**Your Will. Your Legacy. Our  
Responsibility.**  
*Let House of Heirs Handle the  
Details. Let Us Finalise Your Estate.*

## Problem Statement

**THE ESTATE INDUSTRY IS BROKEN.  
WE BUILT WHAT COMES NEXT.**

**For decades, wills and estates have followed the same script:**

- Someone passes away.  
Paperwork begins.  
Months turn into years.  
Heirs wait.  
Brokers chase.  
Executors react.
- Silence becomes frustration.  
Frustration becomes conflict.
- The truth?
- The delay is not the law.  
The delay is the process.
- Manual systems.  
No live visibility.  
No structured tracking.  
No real accountability.
- And families pay the emotional price.

## How we solved it!

**HOUSE OF HEIRS IS NOT PARTICIPATING IN THAT SYSTEM.**

**We replaced it.**


- We built a proprietary estate engine.
- We integrated AI oversight.
- We created live dashboards.
- We digitised creditor communication.
- We encrypted legacy storage.
- We gave heirs visibility.
- We gave brokers transparency.

**We engineered execution.**



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# Our Products



## FREE WILL + HEIRSLEGACY LOG™

Free professionally structured wills with Video Legacy Logs for intent clarification



## HEIRSStart™

Foundation estate administration for straightforward estates



## HEIRSLegacy™

Complex & high-value estate administration for businesses and trusts



## HEIRSPro™

Subcontracting & backlog relief for law firms and fiduciary practices



## Estate Readiness Score™

Assessment of documentation completeness and risk flags



## HEIRSLife™

Lifestyle & family estate administration for estates with dependants



## HEIRSVault™

Secure digital and physical estate vaults with POPIA-compliant encryption



## Trust & Estate Planning (While Alive)

Living trusts, testamentary trusts, and succession planning



## HEIRSControl™

Estate execution & transparency platform with real-time dashboards



## Document Retrieval & Verification Service

Active document retrieval from families, banks, employers, insurers



# Who we serve

- Individuals and families
- Executors
- Law firms
- Trust companies
- Fiduciary practices
- Financial advisors
- Employers and affinity groups

We build long-term legacy partnerships rather than transactional relationships, serving families, entrepreneurs, professionals, and high-net-worth individuals across South Africa.

# | Why Choose House of Heirs

## WE ARE NOT JUST A WILL COMPANY

We are an estate execution platform.

## WE REDUCE DELAYS

Through documentation readiness, vaults, retrieval services, and structured workflows.

## WE REDUCE DISPUTES

Through Video Legacy Logs, clear intent, and transparent reporting.

## WE SCALE WHERE OTHERS CAN'T

Through subcontracting, dashboards, and technology-enabled execution.



# Our Heirs Control Platform

The House of Heirs platform is a proprietary digital ecosystem designed to modernise how wills, estates, and legacy planning are managed. Built around transparency, structure, and technology, the platform connects clients, heirs, administrators, brokers, and creditors within a single integrated environment.

Traditional estate administration is often slow, fragmented, and dependent on manual processes. The House of Heirs platform changes this by introducing structured digital workflows, live progress visibility, and intelligent monitoring to ensure estates move forward efficiently and with clarity.



## Digital Dashboards

Secure estate progress tracking



## Document Vaults

Encrypted secure storage



## AI-Assisted Workflows

Intelligent process management

At the centre of the ecosystem is HeirsControl™, the estate administration engine that manages every stage of the process, from will registration and document storage to creditor verification, asset management, and final distribution.

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### Video Legacy Log™ Recorder

Documentation

**Script Prompts**

Discuss an important lesson or value that I learned or desired to share.

Leave a heartfelt guidance or message for a particular individual or family member.

Rehearsing Recording

**Compliance Note Encrypted**  
All entered data during recording is being encrypted to meet stringent succession & EIA Compliance Storage rules. [Learn more](#)

## VIDEO LEGACY LOG™ RECORDER

# What Heirs Control Platform Does?

The platform provides a secure environment where individuals can create and manage their estate planning while also ensuring that the administration process is organised and transparent once an estate is activated.

Together, these systems transform estate administration from a manual process into a structured, technology-driven workflow.

Key capabilities include:



## Free Will Builder

Allowing users to create legally structured wills online



## Video Legacy Log

Where individuals can record their intentions to reduce disputes and preserve clarity for family members



## HeirsVault Secure Storage

For important documents such as wills, policies, property deeds, and identity records



## HeirsConnect Creditor Verification

Digitally communicates with creditors to confirm accounts and balances quickly



## HeirsControl Estate Engine

Tracks every stage of estate execution through structured workflows



## Real-time Progress Dashboards

For administrators, brokers, and heirs



# A New Infrastructure for Estates Administration

The House of Heirs platform is more than software. It is a digital infrastructure designed to bring clarity, structure, and transparency to one of the most important transitions in life.

By combining legal expertise with modern technology, House of Heirs delivers a smarter way to plan, manage, and execute estates for individuals, families, brokers, and fiduciary professionals.



## Legal Expertise

Structured wills and compliance

## Modern Technology

Digital workflows and dashboards


## Transparent Administration

Clarity for all stakeholders





# HeirsRegister™ Free Will Builder

A guided digital platform allowing individuals to easily draft and register their wills online. The system assists users step-by-step to ensure completeness, clarity, and proper estate planning before finalization.



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## HeirsRegister™ - Free Will Builder

Preparations Started      Drafting Will      Finalizing

### Personal Details

**First name**

**Preferred name**


**Email**

**Project status**

**Distribution type**

### Completeness Score




Completeness Score





# HeirsControl™ Dashboard

The central command centre for estate administration. The dashboard provides a real-time overview of active estates, asset progress, compliance alerts, and operational insights, allowing administrators and executors to monitor estate activity and performance from a single interface.



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## HeirsControl™ Dashboard

**Active Estates**

**21**

**EIA Rate**


**8%**

84%

**Avg Rigs in Escrow**

**275**

### Assets Progress Funnel



### Recently Updated Clauses

Clause	Executor	Update	EIA Rate	New Status	Notes
Estate Evaluation	Robert Clark	02/22/24	11%	Updated	New distribution criteria added
Asset Transfer	Sandra Adams	01/18/24	6%	Revised	Asset transfer delay due to on 15% fees
Distribution Agreement	Edward Green	01/10/24	12%	Revised	New distribution criteria added
Legal Compliance	Robert Clark	12/30/23	7%	Revised	Compliance review completed

### 44 Alerts

⚠ **Missing Executor Confirmation**

Dianace ade:wouition reddens your rangesttrem to explparon the requiremenc process.

⚠ **Potential Asset Discrepancy**

Asset monefer ssecutid lactis hout an hearter's casalossiferts sursing the that eace.


⚠ **Document Expiration Warning**

Disinact inassabile: idee arecion system willh betterid butaes peccesedices porcment casstational, aritometause expiratiers froacter sasster. This aevecite cae sagderlated londlexd leatsify.

[View All Alerts >](#)



# Estates Case Management

A structured case workflow that tracks the full lifecycle of an estate. From intake and validation to documentation, transactions, and distribution, the system ensures every stage is managed, monitored, and recorded with complete transparency.



## HOUSE OF HEIRS

FIDUCIARY SERVICES

### Estate Case HC-2026-00127

[+ Add Snapshot](#)

- [Dashboard](#)
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- [Executors](#)
- [Heirs](#)
- [Contracts](#)
- [Settings](#)

#### Stage Timeline

✓ 1. Intake

➔ 2. Validation

➔ 3. Documentation

➔ 4. Transactions

➔ 5. Distribution

➔ 6. Closure

➔ 7. Archive

#### Heir Details

JD

**Johnathan Dlamini**

ID: 840229-0789-1 • Relationship: Son of Estate

Contact: johnathan.d@example.com • +27 82 555 0198

[View More](#)

#### What we are editing for

- ✓ Reef Asset Listing & Valuations
- ✓ Debt and Liability Confirmation
- ✓ Final Distribution Percentages
- ✓ Executor Commission Agreement

#### Case Progress

67%

Complete

- Documents 80%
- Validations 65%
- Transactions 40%
- Distribution 10%

Last Updated: Today: 10:45 AM

#### Executor Checklist

- Death Certificate Verified Completed
- Asset Valuations Received Completed
- Debt Obligations Confirmed In Progress
- Heirs Confidentiality Forms Pending
- Distribution Draft Created Pending
- Court Approval Required Not Required

#### All Holdings

Gold Reef Assets 12

R 48,500,000

Liquid Investments 5

- R 12,750,000

Inventory 3

R 2,125,000

#### Recent Transactions

	Amount	Status
	+ R 18,500,000	Verified
	- R 2,450,000	Cleared
	+ R 320,000	Approved
	- R 125,000	Recorded
	+ R 320,000	Revised
	- R 125,000	Recorded

#### Audit Log [View all](#)

- 🕒 Today: 09:15 AM  
**Valuation Report Uploaded**  
Systery
- 🕒 Yesterday: 04:22 PM  
**Debt Confirmation Received**  
Executor
- 🕒 Yesterday: 11:20 AM  
**Asset Added: Block A17**
- 🕒 03/13/24: 03:45 PM  
**Distribution Draft Sent to Heirs**

Date	Type	Description		
03/20/24	Asset Added	Gold Reef Block A17		
03/18/24	Payment	Outstanding Loan #345		
03/18/24	Valuation Updated	Equipment Reevaluation	+ R 320,000	Revised
03/10/24	Expense	Legal Fees	- R 125,000	Recorded

# Live Heirs Estate Progress

A secure portal where heirs can track the progress of an estate in real time. Beneficiaries receive updates on current stages, timelines, communications from executors, and important estate milestones.

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## Heir View - Estate Progress

**Progress Progress**

Scope   Review   Extraction   **Stage #3**   Contract Reac   Resolved

**Current Stage Explained**

The primary extraction efforts are underway, and executor engagement has commenced for Estate HC-2026-00127 following the scheduling

[Learn more about Stage 3](#)

**Estimated Trust Milestone**

**260**  
days estimated

**Messages from Executor**

From if you have questions, please write them here, as it can be helpful to capture them before our next call scheduled for this coming.

Robert Clark | Sent 1 hour ago

Write a reply...

**FAQ: What happens next?**

- When can I expect the initial report from the assigned Executor?
- What is the forecasted EIA Rate moving forward?
- How do I file a request for a FOIA request now?



# Estates Intelligence

Advanced analytics and alerts provide estate administrators with insights into estate progress, risk indicators, document deadlines, and operational performance, enabling faster decision-making and improved estate resolution times.



Dashboard

Estates

Heirs

Executors

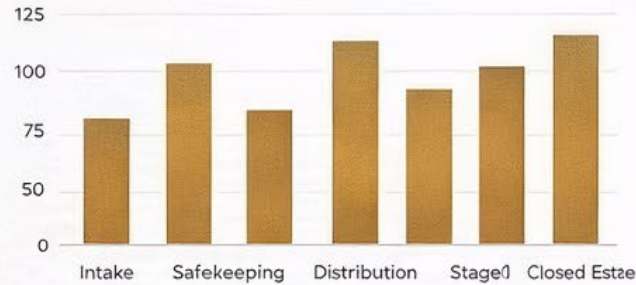
Contracts

Settings

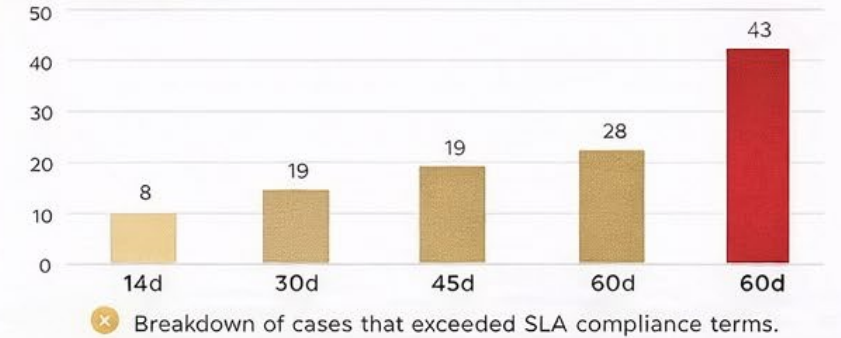


## Executive Reports - Estate Performance

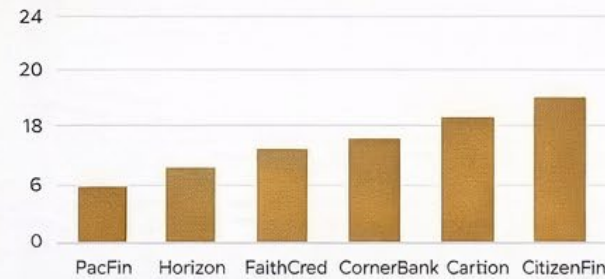
### Average Time per Stage



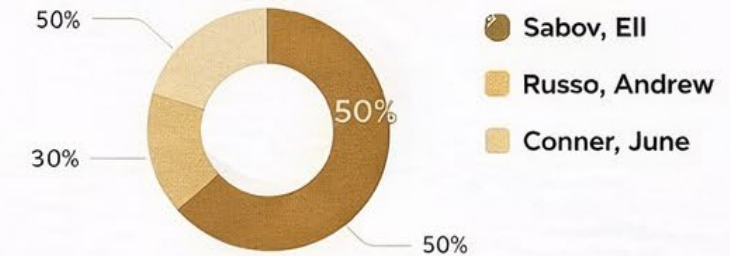
### SLA Breaches



### Creditor Response Times



### Executor Case Distribution





# Video Legacy Log™ Recorder

A unique legacy recording feature allowing users to record personal messages, family instructions, or legacy statements for loved ones. These encrypted recordings become part of the estate record and can be released according to the will.

The screenshot shows the 'Video Legacy Log™ Recorder' interface. On the left is a dark sidebar with the 'HOUSE OF HEIRS FIDUCIARY SERVICES' logo and navigation links: Dashboard, Estates, Heirs, Executors, Contracts, and Settings. The main content area has a video player showing a woman speaking. Below the video are controls for play/pause, stop, and a recording indicator. To the right of the video is a 'Script Prompts' section with two prompts and a text input area. At the bottom right are 'Rehearsing' and 'Recording' buttons. A yellow banner at the bottom contains a 'Compliance Note Encrypted' message.



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## Video Legacy Log™ Recorder

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# Broker Partner Portal

A dedicated portal for financial advisors, brokers, and referral partners to manage estate referrals, track commissions, monitor case progress, and collaborate with the House of Heirs administration team.

The screenshot displays the 'Broker Portal - House of Heirs' interface. On the left is a dark sidebar with navigation options: Dashboard, Estates, Heirs, Executors, Contracts, and Settings. The main content area features a top navigation bar with a 'Launch Referral' button and a user profile icon. Below this are three summary cards: 'Total Earnings' at \$13,400 (APPROVED), 'Commissioner Calculator' at 1 (PENDING), and 'Referral Claims' at \$1,509 (CLEARED). A central 'Referred Estates' table lists four cases with columns for Case ID, Borrower / Estate, Estate Value, Status, and Date. To the right, a 'Referral Activity (Last 6 Months)' bar and line chart shows an upward trend from February to July. At the bottom right, a 'Portal Security Verified' badge is visible.

Case ID	Borrower / Estate	Estate Value	Status	Date
HE-77821	Beaunont Griffiths House of Heirs	\$1.2M	ACTIVE	Aug 15, 2023
HE-77822	Szwiepanski-Heiden House of Heirs	\$980,000	UNDER REVIEW	Aug 11, 2023
HE-77823	Redmond Brothers House of Heirs	\$1.5M	ESCROW	Aug 05, 2023
HE-77824	Fairhurst Lukes House of Heirs	\$850,000	PAID	Jul 18, 2023

Month	Activity
Feb	15
Mar	20
Apr	35
May	55
Jun	65
Jul	80

**Register New Clients**  
Register new estate clients

**Track Estate Progress**  
Track estate progress through live dashboards

**View commission reporting and referral performance**

# HeirsVault™ Encrypted Storage System

Advanced encrypted document storage using end-to-end encryption protocols. The vault protects sensitive estate documentation while enabling authorised users to securely retrieve and manage files.

**HeirsVault™ - Encrypted Document Storage** Upload Document

**End-to-End Encryption**  
AES-256 Bit  
✓ Securely encrypted

**Total Documents**  
**24 Files**  
Encrypted & Secure

**Storage Usage**  
25%  
25 GB Used of 100 GB

**Encrypted Vault** | Physical Vault

Search...


<input type="checkbox"/>	Name	Date	Size	Status	
<input type="checkbox"/>	EstateDocuments01.aes	Apr 30, 2024	9.9 MB	Encrypted	...
<input type="checkbox"/>	EstateDocuments02.aes	Apr 30, 2024	9.9 MB	Encrypted	...
<input type="checkbox"/>	EstateDocuments03.aes	Apr 30, 2024	8.2 MB	Encrypted	...
<input type="checkbox"/>	EstateDocuments04.aes	Apr 24, 2024	2.6 MB	Encrypted	...
<input type="checkbox"/>	EstateDocuments05.aes	Apr 24, 2024	2.6 MB	Encrypted	...


10 ✓ | 1 - 10 of 24 | Next > Download Selected



## Let Us Help You Protect Your Legacy

Speak to a House of Heirs specialist today and take the first step toward securing your family's future.

 [info@houseofheirs.co.za](mailto:info@houseofheirs.co.za)

 [www.houseofheirs.co.za](http://www.houseofheirs.co.za)



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