

**FISA**<sup>TM</sup>

THE FIDUCIARY INSTITUTE OF SOUTH AFRICA



## The Fiduciary Institute of South Africa (FISA)

The Fiduciary Institute of South Africa (FISA) is a non-profit organisation that represents fiduciary practitioners and sets high minimum standards for the industry to protect the public's interests.

FISA has over 700 individual members, who collectively manage in excess of R250 billion. Membership is drawn from trust companies and banks, as well as the legal, accounting and financial planning professions.

### Why should you deal with a FISA member?

If you are looking for a professional to draft your will, act as a trustee or executor, or plan your affairs to care for your family after your death, make sure you deal with a fiduciary practitioner who is a FISA member.

In this way, you can rest assured that you are dealing with a professional who meets a high minimum standard of competence, integrity and honesty and who also has the necessary administration systems to provide a professional service.

### What does FISA do?

Activities of FISA members include but are not restricted to the drafting of wills, administration of trusts, beneficiary funds and estates, tax and financial advice and the management of client funds. FISA members draft several thousand Wills each year and administer around 50 percent of deceased estates reported to the Master's Office.

FISA works closely with government, advising on fiduciary law, helping to reduce cumbersome legislation and streamlining many processes. We also work actively to educate the public about fiduciary issues. We submit information to the media and we publish articles of interest on our website.

### Complaints

FISA is here to protect you. We are a self-regulating body with the powers to discipline members and revoke membership. You can lodge a complaint with us if a practitioner does not adhere to our ethical standards and we can help you resolve disputes in fiduciary matters. We will remain involved until the complaint has been resolved. To lodge a complaint, visit our homepage at [www.fidsa.org.za](http://www.fidsa.org.za)

**HOW DO I FIND A FISA MEMBER IN MY AREA?**

Email us at [secretariat@fidsa.org.za](mailto:secretariat@fidsa.org.za) or visit our homepage at [www.fidsa.org.za](http://www.fidsa.org.za)