



THE FIDUCIARY INSTITUTE OF SOUTHERN AFRICA



WESTERN CAPE REGIONAL ELECTION MEETING 2017
MINUTES of the regional election meeting held on
15 August 2018
at **Royal Cape Yacht Club, Duncan Road, Table Bay Harbour,**
CAPE TOWN

1.	OPENING																																																														
1.1.	<p>Ryno Venter, welcomed all members present, for the first joint meeting of FISA and STEP</p> <p>Alfie Bester propose an amendment to the minutes of the previous meeting, held on the 17th of May 2018, regarding the members' names, and this was seconded by Keane Brentley.</p> <p>The meeting has been opened.</p>																																																														
1.2	<p><u>Attendees</u></p> <table border="1"><tr><td><u>Madeleine Abrahams</u></td><td>Sarah Love</td></tr><tr><td>Madelyn Barnard</td><td>Almo Lubowski</td></tr><tr><td>Alfie Bester</td><td>Keith McDonald</td></tr><tr><td>Helen Blackbeard</td><td>Vivienne McDonald</td></tr><tr><td>Pauline Bongers</td><td>Fiona McKend</td></tr><tr><td>Eckhard Borman</td><td>Merwe Moelich</td></tr><tr><td>Keane Brentley</td><td>Karl Nathanson</td></tr><tr><td>Nicolaas Brink</td><td>Boitumelo Ndhlovu</td></tr><tr><td>Mark Butler</td><td>Elana Nel</td></tr><tr><td>Wayne Buys</td><td>Jannicke Noeth</td></tr><tr><td>Dirk Coetzee</td><td>Najma Parker</td></tr><tr><td>Linda Coffee</td><td>Barry Pogrund</td></tr><tr><td>Johann de Vos</td><td>Elmien Pols</td></tr><tr><td>Niel du Plessis</td><td>Riaan Erasmus</td></tr><tr><td>Brenton Ellis</td><td>Bernard Sachs</td></tr><tr><td>Wilhelmina Erasmus</td><td>Annemarie Schutte</td></tr><tr><td>Charles Evison</td><td>Brent September</td></tr><tr><td>Mohamed Farook Jeewa</td><td>Cobus Slabber</td></tr><tr><td>Ceris Field</td><td>Anthea Stephens</td></tr><tr><td>Jacques Fourie</td><td>Tertius Troost</td></tr><tr><td>Russell Grebe</td><td>Elna van der Walt</td></tr><tr><td>Lauren Hean</td><td>Elizabeth van der Westhuizen</td></tr><tr><td>Inge Heath</td><td>Rob van Dyk</td></tr><tr><td>Alysha Heyns</td><td>Maretha van Huyssteen</td></tr><tr><td>Mogamat Jarodien</td><td>Erasmus van Niekerk</td></tr><tr><td>Catherine Johnstone</td><td>Morne van Niekerk</td></tr><tr><td>David Knott</td><td>Louis van Vuren</td></tr><tr><td>Rodney Koen</td><td>Debby van Wyk</td></tr><tr><td>Schalk Kotze</td><td>Hugo van Zyl</td></tr><tr><td>Valma Kruger</td><td>Ryno Venter</td></tr><tr><td>Demi Lawrence</td><td>Anna Wessels</td></tr></table>	<u>Madeleine Abrahams</u>	Sarah Love	Madelyn Barnard	Almo Lubowski	Alfie Bester	Keith McDonald	Helen Blackbeard	Vivienne McDonald	Pauline Bongers	Fiona McKend	Eckhard Borman	Merwe Moelich	Keane Brentley	Karl Nathanson	Nicolaas Brink	Boitumelo Ndhlovu	Mark Butler	Elana Nel	Wayne Buys	Jannicke Noeth	Dirk Coetzee	Najma Parker	Linda Coffee	Barry Pogrund	Johann de Vos	Elmien Pols	Niel du Plessis	Riaan Erasmus	Brenton Ellis	Bernard Sachs	Wilhelmina Erasmus	Annemarie Schutte	Charles Evison	Brent September	Mohamed Farook Jeewa	Cobus Slabber	Ceris Field	Anthea Stephens	Jacques Fourie	Tertius Troost	Russell Grebe	Elna van der Walt	Lauren Hean	Elizabeth van der Westhuizen	Inge Heath	Rob van Dyk	Alysha Heyns	Maretha van Huyssteen	Mogamat Jarodien	Erasmus van Niekerk	Catherine Johnstone	Morne van Niekerk	David Knott	Louis van Vuren	Rodney Koen	Debby van Wyk	Schalk Kotze	Hugo van Zyl	Valma Kruger	Ryno Venter	Demi Lawrence	Anna Wessels
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David Legodi	Ronel Williams
Karen Lotter	
Gerhardus Lourens	
Nico Louw	

1.3

Apologies

Najeeba Abrahams	Vanessa Nicholas
Janap Allie	Edwin Oblowitz
Malissa Anthony	John Plimsoll
Tim Bellairs	Marius Porgieter
Tiaan Brand	Carien Pretorius
Alida Brink	Claude Smit
Marilyn Brown	Pieter Steenkamp
Lorraine Coetzee	Anine Theron
Solomon Daniels	Mare van der Walt
Gerald Diamond	Lynise van der Watt
Mandy Dix-Peek	Francois van Gijsen
Naayma Domingo	Nico van Gjsen
Stephanus du Toit	Carolina van Huyssteen
John Falconer	Lesley van Rooijen
Willem Fourie	Jaco van Straaten
Robert Garner	Jan van Zyl
Werner Greeff	Burger Visser
Anthony Hakime	Wanda Visser
Lyn Hamer	Yolanda Visser
Edgar Hasley	Gerhard Voges
Johannes Jacobs	Ilze Voges
Arthie Kander	Lynette Voigt
Angela Leonard	Marius Vorster
Hennes Louw	Suné Wessels
Marguerite Marais	Lorraine White
Fabiola Marques	Chanel Williams
Antoinette Martin	
Seugnet Moggee	
Sankie Morata	
Odette Moses	
Chris Murphy	

2. MATTERS ARISING FROM PREVIOUS MINUTES

There are no matters arising from the previous meeting.

3. MASTER'S OFFICE

The Master's Office was invited to the meeting. Awaiting their response to invitation to attend the meeting during office hours.

If members still require guidelines regarding lodging issues with the Master's Office and / or correspondence they should contact Brenton.

	<p>It was mentioned that the Master's Office takes a long time to make a ruling. Ryno mentions that issues with the Master's Office, has to be escalated through the correct channels at the local Master's Office, before it can be escalated to the office of the Chief Master. In such instances, the matters should be referred to Patrys.</p> <p>Issues should also be lodged / recorded on the FISA Website, who in turn will escalate the matters. It will also assist FISA to keep a record of such matters, give the industry an indication of ongoing issues, and the magnitude thereof.</p> <p>Fast Track files have been provided and will be handed out after the meeting.</p>
4.	SARS
	<p>Dirk gives feedback on the SARS matters:</p> <p>FISA appointments are available for Trust and Estate Registrations. Special appointments will be allowed for bulk Trust Registrations.</p> <p>The "Change-of-Banking-Details" procedure will change and will only be possible for estates.</p> <p>Members are requested to give their input on the matter until the 31st of August 2018.</p> <p>Another site meeting is scheduled for the 13th of September 2018 and all issues will be submitted together.</p> <p>Ongoing and recurring problems will also be addressed.</p>
5.	BANKING INSTITUTIONS
	<p>Ryno and Chris will see all the heads for the Banking Channels, to discuss ongoing issues.</p> <p>It is mentioned that FNB has a month turnaround times to give balances on deceased estates and they do not entertain queries beforehand.</p>
6.	GENERAL
	<p>The following stats are made available regarding the answers provided to the questions posed on the registration (for meetings):</p> <ul style="list-style-type: none"> - FISA Focused Newsletter = 60% useful - FISA Website useful? <ul style="list-style-type: none"> • Very Useful = 46% • Somewhat Useful = 44% - New Client referral from Website = 90% answered NO <p>Louis might consider taking members' details off the website.</p>
	CLOSING
	<p>The meeting was closed, and members thanked for their attendance.</p>
	<p>A CPD session was held by Diane Seccombe on Section 7C</p>

