



THE FIDUCIARY INSTITUTE OF SOUTHERN AFRICA



**WESTERN CAPE REGIONAL MINUTES of the regional
meeting held on
21 February 2019
at Royal Cape Yacht Club, Duncan Road, Table Bay Harbour,
CAPE TOWN**

1.	OPENING																																																																
1.1.	<p>Tanya Lochner, welcomed all members present, and apologize for Ryno's absence as he excused himself.</p> <p>Brenton Ellis propose confirmation of the minutes of the previous meeting. Chris Murphy confirms the proposal</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>Valma Kruger</td></tr><tr><td>Tonya Barnard</td><td>Chirag Lakhani</td></tr><tr><td>Tania Bernardo</td><td>Demi Lawrence</td></tr><tr><td>Arné Bester</td><td>Lance Lawson</td></tr><tr><td>Sean Beagley</td><td>Tanya Lochner</td></tr><tr><td>Helené Bentz</td><td>Grant Louw</td></tr><tr><td>Alfie Bester</td><td>Nico Louw</td></tr><tr><td>Arné Bester</td><td>Sarah Love</td></tr><tr><td>Johann Bezuidenhout</td><td>Viv McDonald</td></tr><tr><td>Helen Blackbeard</td><td>Sharon MacHutchay</td></tr><tr><td>Pauline Bongers</td><td>Suzette Malherbe</td></tr><tr><td>Nicolaas Brink</td><td>Fiona McKend</td></tr><tr><td>Richard Bryant</td><td>Rita Mendes-Abreu</td></tr><tr><td>Charlene Cedras</td><td>Lizanne Mentz</td></tr><tr><td>Dirk Coetzee</td><td>Merwe Moelich</td></tr><tr><td>Alicia Cupido-Woodman</td><td>Karen Müller</td></tr><tr><td>Bruce Daniel</td><td>Chris Murphy</td></tr><tr><td>Margaret Daniels</td><td>Najma Parker</td></tr><tr><td>Solomon Daniels</td><td>Elmien Pols</td></tr><tr><td>Louise Danielz</td><td>Jacques Potgieter</td></tr><tr><td>Olivia de Freitas</td><td>Bernard Sacks</td></tr><tr><td>Jan de Jager</td><td>Nandi Sauer</td></tr><tr><td>Sandy De Wet</td><td>AD Schoeman</td></tr><tr><td>Johann de Vos</td><td>Annemarie Schutte</td></tr><tr><td>Reghardt Draper</td><td>Barbara-Anne Segalla</td></tr><tr><td>Frederick du Toit</td><td>Francois Snyman</td></tr><tr><td>Brenton Ellis</td><td>Shaun Stewein</td></tr><tr><td>Elmaréne Erasmus</td><td>Fiona Store</td></tr><tr><td>Sulaiman Fakir</td><td>Frederick Troost</td></tr><tr><td>Mohamed Farook Jeewa</td><td>Cathy van der Merwe</td></tr><tr><td>Werner Fuls</td><td>Elizabeth van der Westhuyzen</td></tr><tr><td>Mark Harris</td><td>Tanya van der Westhuizen</td></tr></table>	<u>Madeleine Abrahams</u>	Valma Kruger	Tonya Barnard	Chirag Lakhani	Tania Bernardo	Demi Lawrence	Arné Bester	Lance Lawson	Sean Beagley	Tanya Lochner	Helené Bentz	Grant Louw	Alfie Bester	Nico Louw	Arné Bester	Sarah Love	Johann Bezuidenhout	Viv McDonald	Helen Blackbeard	Sharon MacHutchay	Pauline Bongers	Suzette Malherbe	Nicolaas Brink	Fiona McKend	Richard Bryant	Rita Mendes-Abreu	Charlene Cedras	Lizanne Mentz	Dirk Coetzee	Merwe Moelich	Alicia Cupido-Woodman	Karen Müller	Bruce Daniel	Chris Murphy	Margaret Daniels	Najma Parker	Solomon Daniels	Elmien Pols	Louise Danielz	Jacques Potgieter	Olivia de Freitas	Bernard Sacks	Jan de Jager	Nandi Sauer	Sandy De Wet	AD Schoeman	Johann de Vos	Annemarie Schutte	Reghardt Draper	Barbara-Anne Segalla	Frederick du Toit	Francois Snyman	Brenton Ellis	Shaun Stewein	Elmaréne Erasmus	Fiona Store	Sulaiman Fakir	Frederick Troost	Mohamed Farook Jeewa	Cathy van der Merwe	Werner Fuls	Elizabeth van der Westhuyzen	Mark Harris	Tanya van der Westhuizen
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Morgan Gregory	Danie van Niekerk
Inge Heath	Debby van Wyk
Alysha Heyns	Hugo van Zyl
Engelize Hitchcock	Leandra Vermaak
Beverley Jackson	Sonja Viljoen
Stuart James	Wanda Visser
Leslene Jones	Warren Wilkinson
Tiaan Jordaan	Ronel Williams
Rodney Koen	Natalie Williams-Ashman
Liezl Kritzinger	

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Apologies

Janap Allie	Antoinette Martin
Tim Bellairs	Seugnet Moggee
Louis Benade	Sankie Morata
Michael Black	Tracy Muller
Julian Boshoff	Boitumelo Ndhlovu
Mark Butler	Wessel Oosthuizen
Wayne Buys	Adrienne O'Shea
Lorraine Coetzee	Carien Pretorius
Linda Coffee	Claude Smit
Ilandi de Jager	Rita Stokes
Mandy Dix-Peek	Pieter Steenkamp
Naayma Domingo	Anneke Terblanche
Robert Garner	Mare van der Walt
Brunie Gerber	Elna van der Walt
Russell Grebe	Lynise van der Watt
Ilonka Grobbelaar	Nico van Gijsen
Lyn Hamer	Linda van Greuning
Joahannes Jacobs	Morne van Niekerk
Yasmin Jadwat	Jan van Zyl
Philip Kilroe	Burger Visser
Jeanine Koopman	Marius Voster
John le Roux	Gerrie Vosser
Karen Lotter	Caroline Wansbury
Hennes Louw	Anna Wessels
Annaliese Lubowski	Lorraine White

2.	MATTERS ARISING FROM PREVIOUS MINUTES
	There are no matters arising from the previous meeting.
3.	MASTER'S OFFICE
	<p>Brenton attended a meeting at the Master's Office, in conjunction with the Law Society.</p> <p>Brenton confirms that the Master's Office is restructuring. The reporting of new estates and queries are moving from Ground Floor / 1st Floor to the individual groups. Thus, the Group will in future deal with all queries / files from Reporting to Finish. The reason for it, is to reduce the risk of files being 'mislaid or getting lost'.</p> <p>Brenton did offer to assist the Master's Office, by 'sitting in' on the process and determine what happens to a file.</p> <p>Hopefully this will assist in resolving some of the problems at the Master's Office.</p> <p>Brenton confirms that a new communication list will circulate as soon as same is available.</p> <p>The Master's Office did get approval to appoint new staff and same will arrive at the end of March. There are still groups which is short staffed.</p> <p>Question from the floor: Why are there delays in the Fast Track files: Answer: There are a general delay / backlog on files lodged in the period prior to Christmas, up to the second week in January. They are working from the top of the pile and the newer files are receiving priority. At the moment, there is only one person dealing with Fast Track files. This will hopefully be resolved by restructuring of the Groups, as the idea is that each Group will (in future) have someone dealing with Fast track files.</p> <p>Once Brenton has more detail, he will send out a communication.</p> <p>Angelique Visser also had a meeting with Surina at the George Branch, office and Brenton is awaiting feedback from that meeting.</p> <p>Brenton confirms that Tessie is adamant that the Master's Office staff should work on / respond to E-mails. Some staff members do answer phones and E-mails, but it is only a few who complies.</p> <p>It is mentioned that there is still difficulty in obtaining Testamentary Trust Appointments. It is attended to by the Groups and should (technically) not take longer than 5 – 7 working days. The same problem exists in obtaining an amendment to a Letters of Executorship. The problem is that these matters are attended to in the Groups and the Examiner does not always have the knowledge to attend thereto.</p> <p>Question: With Testamentary Trust it is a problem on older files, to get the file back to the Examiner. The files older than 2012 are kept at a different office. A: The application to get the file should take a week. Files older than 2002 are kept at Roeland Street.</p> <p>In the Master's Office in Pretoria, the files have been moved to Metro File,</p>

4.	SARS
	<p>Dirk introduced Mr. Waseem Williams (Regional Operations Manager, Estates and Audit) from SARS.</p> <p>Mr. Williams apologize for not attending previous meetings.</p> <p>Mr. Williams proceed to provide an Overview od Estates Audit and Assessment by way of a presentation. He explains the 4 divisions within SARS:</p> <p>Portfolio Maintenance:</p> <ul style="list-style-type: none"> • What assessment must be raised (including Estate Duty) <p>Account Maintenance:</p> <ul style="list-style-type: none"> • If there is a Credit, it would also include the updating of the Banking Details <p>Debt Management:</p> <ul style="list-style-type: none"> • Rover outstanding debt due to SARS <p>Technical:</p> <ul style="list-style-type: none"> • The deals only with Estates which have been submitted to the Master's Office • Administrator must submit the same documents which have been submitted to the Master's Office. <p>Cape Town Office will deal with Estate Duty and Approval of CC documents. For shares in a private company, the documents are still submitted to Cobus Visser.</p> <p>Brenton ask for work procedure and what is required: Answer: Use the Estate Duty Inbox. It is managed by SARS Officials who will forward the query to the correct SARS Office, for response.</p> <p>Pauline ask whether members can E-mail documents to their (Cape Town) Office. Answer: Use Estate Duty Inbox or E-mail to : contact.south@sars.gov.za</p> <p>Take note that they work on a "fist in, first out" basis,</p> <p>It is mentioned that members will not receive Estate Duty Clearance, of they do not receive DEC on Income Tax.</p> <p>It is confirmed that for Second Period you need to code 'up to date of death registration'.</p> <p>Suggestions:</p> <ol style="list-style-type: none"> 1. Communication opened to the 4 divisions of SARS directly 2. Improved communication with Master's Office.
5.	BANKING INSTITUTIONS
	There is nothing to report on Banking Institutions..
6.	GENERAL
	There no items for discussion.

	CLOSING
	The meeting was closed, and members thanked for their attendance.
	A CPD sessions was presented by Hugo van Zyl and Tim Powell