

Estate Planning Workshop

Date: 6th April 2022

Time: 08:50 – 13:00

CPD: TBC

Price: FPI and FISA Members R400

Non Members R500

Bulk Bookings: R400

For more information visit www.fpi.co.za

Join the Financial Planning Institute of Southern Africa for the **2022 Estate Planning Workshop**. This event will be a live online event with designated time for delegates to engage with the presenters.

Estate planning is a vital component of holistic financial planning, and this year's Estate Planning workshop will comprise of some important developments in the estate planning environment as well as a deeper look into several other aspects of estate planning.

Kicking off the session will be **David Hurford**. David will be presenting on **Umbrella Trusts and Beneficiary Funds**. In his presentation David will discuss the background of Umbrella Trusts and Beneficiary Funds as well as address the differences. He will also delve into how the death benefit allocation works as well as the application process, Income and Capital ad-hoc policy but to name a few.

Following on from David we have **Thokozani Radebe CFP®** who will discuss **Estate Planning Conundrums – Married or not**. Thokozani who will go into an in-depth analysis of the case on **JANE BWANYA V THE MASTER OF THE HIGH COURT**. In December 2021 the Constitutional Court handed down judgment in an application for confirmation of an order of constitutional invalidity of section 1(1) of the Intestate Succession Act made by the Western Cape Division of the High Court. The judgment also encompasses an application for a direct appeal against the High Court's dismissal of a challenge to the constitutional validity of the definition of "survivor" under section 1 of the Maintenance of Surviving Spouses Act. This has now changed the landscape on estate planning for unmarried heterosexual couples. She will also address important considerations for estate planning when dealing with clients who are married in terms of Customary Law.

With the outflux of South Africans abroad and having assets in South Africa as well as overseas, this will have a direct impact on estate planning. Joining us to address **Global Financial Planning: Wills for local and foreign assets is ADV. Sankie Morata CFP®**. In this topic ADV Morata will address the importance of ensuring that your will/wills cover all assets local and abroad.

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Agenda

Time	Topic	Speaker
08:50 – 09:00	Welcome	Nici MacDonald, CFP® FPSA®
09:00 – 10:15	Umbrella trusts and beneficiary funds	David Hurford
10:15 – 10:25	Comfort Break	
10:25 – 11:40	Estate Planning Conundrums – Married or not	Thokozani Radebe, CFP®
11:40 -11:50	Comfort break	
11:50 -13:00	Global Financial Planning: Wills for local and foreign assets	Sankie Morata, CFP®
13:00	Closing	Nici MacDonald, CFP® FPSA®