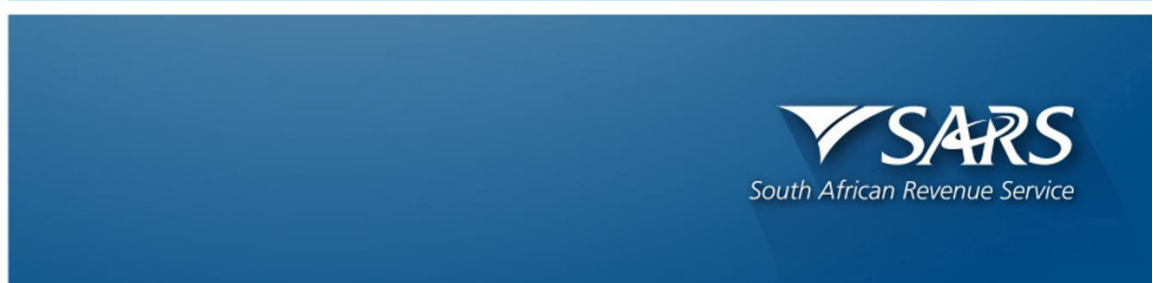
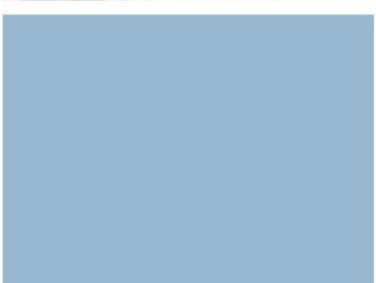




**Estates**  
Gauteng South  
19 May 2022



# Contents

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# Escalated Matters

- ❑ When must a registered representative details be updated?

The RR details can only be updated after the tax number has been coded as an estate.

- ❑ How to request a deceased estate tax number

An appointment can be made with the Branch Office via e-Bookings [SARS Booking System](#) to request the tax number.

Documents required: Letter of executorship and your ID document

NB: you can also report the estate in the same booking if you have all the documents

# Escalated Matters

- ❑ Can the ID number of the deceased be used to report the estate online?

Unfortunately, we cannot use the ID as the tax number is required for the generation of the case on the core systems.

- ❑ Contact us email address not working

Please provide us with examples so we can test the process and report back.

# Process Matters

- ❑ Tax practitioner access to e-Filing profile (not registered representative)
  - The tax practitioner should request a 'Tax type Transfer' on e-Filing.
  - An e-mail will be sent to the Registered Representative to authorise the profile transfer. This is done via the SARS secure website and does not require the Registered Representative to log onto e-Filing.
  
- ❑ Estate Duty payable by beneficiaries
  - The Estate Segment team is currently working on a process to address the matter.

# Education and Engagement

## □ Training Sessions

- The Estate Segment is planning to hold training session for external stakeholders this year.
- FISA members are encouraged to provide us with topics that these sessions should cover.

# SARS Digital Resources

- ❑ Contact Centre Number: 0800 00 7277
  - Between 08:00 and 17:00
  - Excluding weekends and public holidays
  
- ❑ Email (quote tax and ID of estate on subject line)
  - [Contactus@sars.gov.za](mailto:Contactus@sars.gov.za) (non-dutiable estates)
  - [Estateduty@sars.gov.za](mailto:Estateduty@sars.gov.za)(dutiable estates)
  - [pcc@sars.gov.za](mailto:pcc@sars.gov.za)
  - [estatesharevaluations@sars.gov.za](mailto:estatesharevaluations@sars.gov.za) (share valuation requests)
  - [SupportingDocs@sars.gov.za](mailto:SupportingDocs@sars.gov.za) – discontinued
  - Estatesegment mailbox will be closed as from 28 February 2022. discontinued
  
- ❑ Online Services
  - [Estates – South African Revenue Service \(sars.gov.za\)](https://www.sars.gov.za)
  - <https://www.sars.gov.za/types-of-tax/estate-duty/>
  - <https://www.sars.gov.za/contact-us/make-an-appointment/>
  - <https://www.sars.gov.za/individuals/i-need-help-with-my-tax/use-our-digital-channels/>

*Thank you*  
*Re a leboha*  
*Re a leboga*  
*Ndza Khensa*  
*Dankie*  
*Ndi a livhuwa*  
*Ngiyabonga*  
*Enkosi*  
*Ngiyathokoza*