



**WESTERN CAPE REGIONAL MINUTES**  
of the regional meeting held on  
**26 November 2020**  
via GoToMeeting & RCYC

1.	OPENING																																																																										
1.1.	<p>Ryno Venter welcomed all members present and extended a special thank you to the sponsor, being Shakleton Risk.</p> <p>The meeting has been opened.</p>																																																																										
1.2	<p><u>Attendees</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Alfred Bester</td><td>Mark Butler</td></tr> <tr><td>Adrienne O'Shea</td><td>Mark Harris</td></tr> <tr><td>Alicia Cupido-Woodman</td><td>Martin Meyer</td></tr> <tr><td>Alida Brink</td><td>Mary Geale</td></tr> <tr><td>Almo Lubowski</td><td>Megen Appolis</td></tr> <tr><td>Andri Barnard</td><td>Najma Parker</td></tr> <tr><td>Ann Nel</td><td>Nerisha Radhella</td></tr> <tr><td>Barbara-Anne Segalla</td><td>Nico Louw</td></tr> <tr><td>Brenton Ellis</td><td>Nicolaas Brink</td></tr> <tr><td>Brunhilde Gerber</td><td>Nina Loots</td></tr> <tr><td>Chris Murphy</td><td>Nontando Mfana</td></tr> <tr><td>Corne Nunns</td><td>Paula Bongers</td></tr> <tr><td>Cornel Wessels</td><td>Petra Sickle</td></tr> <tr><td>David Legodi</td><td>Richard Bryant</td></tr> <tr><td>Eileen Langman</td><td>Rita Mendes-Abreu</td></tr> <tr><td>Ekhard Borman</td><td>Rita Stokes</td></tr> <tr><td>Elmarene Erasmus</td><td>Rodney Koen</td></tr> <tr><td>Elmien Pols</td><td>Ryno Venter</td></tr> <tr><td>Elna Van Der Walt</td><td>Sarah Love</td></tr> <tr><td>Elsa Van Der Westhuysen</td><td>Sean Beagely</td></tr> <tr><td>Engelize Hitchcock</td><td>Seugnet Moggee</td></tr> <tr><td>Fiona McKend</td><td>Showkat Mukadam</td></tr> <tr><td>Franscois Van Gijsen</td><td>Solly Fakir</td></tr> <tr><td>Gerhard Lourens</td><td>Solomon Daniels</td></tr> <tr><td>Ielhaam Pegram</td><td>Sonja Linde</td></tr> <tr><td>Inge Heath</td><td>Sonja Viljoen</td></tr> <tr><td>Jeanine Koopman</td><td>Suzette Malherbe</td></tr> <tr><td>Karen Lotter</td><td>Tanya Lochner</td></tr> <tr><td>Koos Du Plessis</td><td>Theresa Tannous</td></tr> <tr><td>Lauren Hean</td><td>Tonya Barnard</td></tr> <tr><td>Laurette Koen</td><td>Valma</td></tr> <tr><td>Leanne Stokes</td><td>Wanda Visser</td></tr> <tr><td>Liezel Clark</td><td>Warren Wilkinson</td></tr> <tr><td>Liezl Kritzinger</td><td>Wasfie Williams</td></tr> <tr><td>Louis Van Vuren</td><td>Wilmi Engelbrecht</td></tr> <tr><td>Madeleen Van Schalkwyk</td><td>Yasmin Jadwat</td></tr> <tr><td>Madeleine Abrahams</td><td>Yvonne de Beer</td></tr> </table>	Alfred Bester	Mark Butler	Adrienne O'Shea	Mark Harris	Alicia Cupido-Woodman	Martin Meyer	Alida Brink	Mary Geale	Almo Lubowski	Megen Appolis	Andri Barnard	Najma Parker	Ann Nel	Nerisha Radhella	Barbara-Anne Segalla	Nico Louw	Brenton Ellis	Nicolaas Brink	Brunhilde Gerber	Nina Loots	Chris Murphy	Nontando Mfana	Corne Nunns	Paula Bongers	Cornel Wessels	Petra Sickle	David Legodi	Richard Bryant	Eileen Langman	Rita Mendes-Abreu	Ekhard Borman	Rita Stokes	Elmarene Erasmus	Rodney Koen	Elmien Pols	Ryno Venter	Elna Van Der Walt	Sarah Love	Elsa Van Der Westhuysen	Sean Beagely	Engelize Hitchcock	Seugnet Moggee	Fiona McKend	Showkat Mukadam	Franscois Van Gijsen	Solly Fakir	Gerhard Lourens	Solomon Daniels	Ielhaam Pegram	Sonja Linde	Inge Heath	Sonja Viljoen	Jeanine Koopman	Suzette Malherbe	Karen Lotter	Tanya Lochner	Koos Du Plessis	Theresa Tannous	Lauren Hean	Tonya Barnard	Laurette Koen	Valma	Leanne Stokes	Wanda Visser	Liezel Clark	Warren Wilkinson	Liezl Kritzinger	Wasfie Williams	Louis Van Vuren	Wilmi Engelbrecht	Madeleen Van Schalkwyk	Yasmin Jadwat	Madeleine Abrahams	Yvonne de Beer
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	<p><b>Mari Steenekamp</b></p> <p><u>Apologies</u></p> <table border="1" data-bbox="316 241 1007 568"> <tr><td>Hugo van Zyl</td><td></td></tr> <tr><td></td><td></td></tr> </table>	Hugo van Zyl																							
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2.	CONFIRMATION OF MINUTES OF PREVIOUS MEETING																								
	<p>The approval of the minutes was proposed by Alfie Bester and seconded by Brenton Ellis.</p> <p>Minutes of previous meeting were confirmed.</p>																								
3.	MATTERS ARISING FROM PREVIOUS MINUTES																								
	<p>Alfie requested that the topic for the CPD points be mentioned on the minutes</p>																								
4.	MASTER'S OFFICE																								
	<p>Brenton advised that the Master Cape Town was closed again this week for 2 days for contamination, with no communication to stakeholders.</p> <p>Ms Agulhas and Mr Lallie were invited to attend the meeting. Although Mr Lallie indicated he would attend, nobody from the Master was present at the venue or online. Louis informed members that, after 2 ½ months of trying, they finally managed to get a meeting with the Deputy Minister of Justice last week, which was initiated by the Johannesburg Attorneys Association. The meeting was attended by representatives of FISA, SAICA, LSSA, SAIPA. The following perennial issues were identified:</p> <ul style="list-style-type: none"> <li>✓ Lack of communication</li> <li>✓ Turnaround times</li> <li>✓ Missing files or mislaying files</li> <li>✓ Lack of responsiveness</li> <li>✓ Consequence management</li> </ul> <p>The newly appointed Chief Master, Mr Martin Mafujane, addressed this meeting and confirmed the existing issues already listed</p> <p>The Deputy Minister of Justice supported the suggestion that regular scheduled meetings per workstream be held with relevant stakeholders, but does not want these meetings to become a PR exercise. The Chief Master has been instructed to issue a directive that these meetings be scheduled and adhered to.</p> <p>Alfie mentioned the only time they get any kind of reaction from the Master, is when they threaten them with a High Court Order to comply, which is not a healthy situation to be in.</p> <p>David Legodi from ABSA Trust shared some examples of latest queries raised, such as:</p>																								

	<ul style="list-style-type: none"> <li>▪ Proof of advert being returned as it doesn't reflect the name of the publication and no invoice for the advert costs included</li> <li>▪ Not accepting their proof of payment of Master's Fees</li> <li>▪ Not accepting affidavit signed by a nominee in the presence of a commissioner of oaths from the same institution</li> </ul> <p>Brenton advised he had a meeting with Ms Adonis to discuss the delays and additional requirements for the issuing of Letters of Executorship via the Fast Track system, such as documents confirming predeceased spouse's death/divorce orders/ANC, etc. He pointed out to her that the Master created the declaration to confirm the marital status and tried to argue the point with her, but to no avail. The reason for the additional requirements, is that the groups have complained that they battle to obtain these documents, which then become a "query" on receipt of the L&amp;D.</p> <p>Adonis will share her "new" list of requirements with Brenton, who will share with members.</p> <p>Alfie briefly shared his experience with the Master refusing to accept the death certificate of a non-resident/non-citizen – a person who was born here, but left RSA 57 years ago, never returned. Master insisted that the death be registered at Home Affairs in SA and was not prepared to accept the one issued outside of SA.</p>
5.	SARS
	<p>Nicolaas Brink informed members that SARS' ADOBE contract ends 31.12.2020, whereafter they will no longer accept documents submitted in this format, but all documents will have to be submitted in HTML.</p> <p>Mr. Williams (SARS) is present (online) and welcomed by Ryno Venter.</p> <p>Mr. Williams confirmed the above information, but had no further information in this regard.</p> <p>He confirmed that the assessing and audit teams work is mainly up to date, up to 20.11.2020, except for some matters where they await outstanding documents from the executors.</p> <p>Members are reminded that his staff will be going on leave from mid December, and encouraged all to get their documents submitted as soon as possible, otherwise the matters will only receive attention in January. Some examples of outstanding documents which can cause delays in the assessment and issuing of a DEC letter:</p> <ul style="list-style-type: none"> <li>● Share Valuation Certificate (issued by Cobus Visser and his team)</li> <li>● Post Death Income tax registration and submission of tax return/s</li> <li>● Predeceased spouse's L&amp;D account (where R7m relief is sought) He takes note of the problems at the Master and obtaining these documents, but unfortunately, this is a requirement, without which they cannot issue the DEC letter. Their access to the Master's Office has also been restricted and they are not permitted to access the offices.</li> </ul> <p>Pre/post death issues seem to have been resolved and changes can now be made online.</p> <p>Registration of tax payers on e-filing remains an ongoing issue</p> <p>Members mentioned the lack of response or acknowledgement of receipt from Cobus Visser. Mr Williams will address this issue with Mr Visser's management, as he does not form part of the estates team.</p> <p>Members queried why they were being called for 5 years tax returns in some matters, where deceased was SASSA pension recipient and clearly not liable for tax. Mr Williams indicated that the members must then submit NIL returns, otherwise a DEC letter cannot be issued. If the system indicates outstanding returns, it cannot be overruled.</p>
6.	BANKING INSTITUTIONS

	<p>Ryno confirmed that no issues were brought to his attention regarding ABSA, Capitec or FNB.</p> <p>Standard Bank is a huge issue. They started an online portal, which had not been properly tested, it crashed and during this time, they experienced a data breach. The matter is receiving attention.</p> <p>Nedbank remains a huge problem. Ryno has made contact with new channels, but cannot share this manager's e-mail address. Members are encouraged to send their queries and issues to Ryno, who will address them with his new contact.</p>
7.	GENERAL
	CLOSING
	The meeting was closed, and members thanked for their attendance.
	<p><b>A CPD session on Offshore Trust was presented by Johan Odendaal of Corpag, followed by session on Estate Planning with Offshore Beneficiaries presented by Brenton Ellis.</b></p>