



THE FIDUCIARY INSTITUTE OF SOUTHERN AFRICA



WESTERN CAPE REGIONAL MINUTES
of the regional meeting held on
27 May 2021
via GoToMeeting

1.	OPENING																																																																						
1.1.	<p>Ryno Venter welcomed all members present. He further covered the rules of the meeting via the GoToMeeting platform.</p> <p>The meeting has been opened.</p> <p><u>Attendees</u></p>																																																																						
1.2	<table border="1"><tr><td>Adrienne OShea</td><td>Mark Harris</td></tr><tr><td>Alicia Cupido-Woodman</td><td>Mari Steenekamp</td></tr><tr><td>Alfie Bester</td><td>Martin Meyer</td></tr><tr><td>Ann Nel</td><td>Mary Geale</td></tr><tr><td>Annemarie Schutte</td><td>Michelle</td></tr><tr><td>Antoinette</td><td>Michelle Cliff</td></tr><tr><td></td><td>Mogamat Rifaat Jarodien</td></tr><tr><td>BRENTON ELLIS</td><td></td></tr><tr><td>Barbara Segalla</td><td>Morné van Niekerk</td></tr><tr><td>Beverley Jackson</td><td>Richard Bryant</td></tr><tr><td>Boitumelo Ndhlovu</td><td>Solomon Daniels</td></tr><tr><td>Carolina</td><td>Najeeba Abrahams</td></tr><tr><td>Ceris Field</td><td>Najma Parker</td></tr><tr><td>Dick Miles</td><td>Nandi Sauer</td></tr><tr><td>Doné Jozephs</td><td>Nerisha Radhella</td></tr><tr><td>Elmien Pols</td><td>Nicolaas Brink</td></tr><tr><td>Elmien Pols</td><td>Nico Louw</td></tr><tr><td>Elna Van der Walt</td><td>Nina Loots</td></tr><tr><td>Elsa</td><td>Olivia De Freitas</td></tr><tr><td>Elsa van der Westhuysen</td><td>Paula Bongers</td></tr><tr><td>Engelize Hitchcock</td><td>Peta Sickle</td></tr><tr><td>Fiona McKend</td><td>Renette Rauch</td></tr><tr><td>Fiona STORE</td><td>Richard William Draper</td></tr><tr><td>Francois Snyman</td><td>Rita Mendes-Abreu</td></tr><tr><td>Francois de Jager</td><td>Rob Picard</td></tr><tr><td>Franscois van Gijsen</td><td>Rodney Koen</td></tr><tr><td>Franscois van Gijsen</td><td>Roegshana Samaai</td></tr><tr><td>Gerhard Lourens</td><td>Ryno Venter</td></tr><tr><td>Gerhard Lourens</td><td>Samantha Booysen</td></tr><tr><td>Gerhard Voges</td><td>Sandy de Wet</td></tr><tr><td>Hendrik Janse van Vuuren</td><td>Sarah Love</td></tr><tr><td>Hugo Van Zyl</td><td>Sean Beagley</td></tr><tr><td>Ielhaam Pegram</td><td>Seugnet Moggee</td></tr><tr><td>Inge Heath</td><td>Sharon Stanton</td></tr><tr><td>Jacques Potgieter</td><td>Solly</td></tr></table>	Adrienne OShea	Mark Harris	Alicia Cupido-Woodman	Mari Steenekamp	Alfie Bester	Martin Meyer	Ann Nel	Mary Geale	Annemarie Schutte	Michelle	Antoinette	Michelle Cliff		Mogamat Rifaat Jarodien	BRENTON ELLIS		Barbara Segalla	Morné van Niekerk	Beverley Jackson	Richard Bryant	Boitumelo Ndhlovu	Solomon Daniels	Carolina	Najeeba Abrahams	Ceris Field	Najma Parker	Dick Miles	Nandi Sauer	Doné Jozephs	Nerisha Radhella	Elmien Pols	Nicolaas Brink	Elmien Pols	Nico Louw	Elna Van der Walt	Nina Loots	Elsa	Olivia De Freitas	Elsa van der Westhuysen	Paula Bongers	Engelize Hitchcock	Peta Sickle	Fiona McKend	Renette Rauch	Fiona STORE	Richard William Draper	Francois Snyman	Rita Mendes-Abreu	Francois de Jager	Rob Picard	Franscois van Gijsen	Rodney Koen	Franscois van Gijsen	Roegshana Samaai	Gerhard Lourens	Ryno Venter	Gerhard Lourens	Samantha Booysen	Gerhard Voges	Sandy de Wet	Hendrik Janse van Vuuren	Sarah Love	Hugo Van Zyl	Sean Beagley	Ielhaam Pegram	Seugnet Moggee	Inge Heath	Sharon Stanton	Jacques Potgieter	Solly
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4.

MASTER'S OFFICE

Nobody from the Master's Office was present at the meeting, despite having been invited and accepting the invitation.

Link was sent to Master's Office yesterday, which has not been read.

This will be reported to Martin Mafojane, as this is the second time they have not attended.

Brenton:

Fast track files: None available, neither with Brenton or at the Master, nothing is available at GPW. Will request Master whether we can use own files. Heard of members' files rejected.

Fast track process: requested list of documents required. Last 6 months changed requirements, eg. Divorce orders, predeceased spouse's documents, etc. Now required at reporting stage, when not necessarily available yet and not necessary to issue the letter of Executorship. Brenton will take this up with the Chief Master, in order to have uniformity

L&D's submitted: MOHC requesting to be translated to English Brenton will take this up with the Chief Master

S42(2) applications: SLA 5 working days. Some groups 3 - 4 weeks. Raising queries not part of their mandate (executor not party to or benefiting from contract, to protect beneficiaries & creditors' interest).

LOA for trusts: Almost every single one issued has spelling mistakes. This was taken up with the AM. The response was that they were short handed and under pressure....

(Unable to identify speaker): Docs sent via reg'd post last year. Documents sent not received/processed, although they have proof of collection. Hand delivered same documents twice. Still no success.

No MO boxes available. They are working on increasing these or at least aware of the issue. It is a process, tenders need to be done, etc.

L&D accounts sent to Magistrate's Court. Received 2 back, envelopes undelivered. Magistrate's Courts don't collect the documents. Brenton suggested to call the offices first, e-mail and courier it. Do not use postal services.

Brenton recommended to rather encourage Master to use e-mail.

Louis: Ian Brink, Penny du Plessis, Aaron Roup and self have meeting on 10 June with Chief Master and one of the items to be addressed is the use of the postal services.

ABSA: Loss of original wills – around 20 – since June last year. Ryno requested member to provide a list of these matters. This must be reported to Martin Mafojane. Brenton mentioned similar issue, but fraud had been committed in his matter, so this is very serious.

Alfie Bester mentioned matter where conveyancers require a certified copy of renunciation in order to pass transfer. This is a high value matter and it has been going on for 18 months. Matter has been escalated on several occasions. It has also been logged on FISA website. All avenues have been followed. Louis suggests that he send a mail to the Chief Master directly.

Louis suggests to members, if you have followed all avenues, including the FISA website, and get no joy.

What about the increase cost of delivering of documents to Master/Magistrate's Office/Deds Offices, by courier, etc. Currently the Master CT allows an amount of R260 in the L&D which is no longer suffice? Brenton responds that in this case, provide Master with proof of actual costs, to apply for special fee. Louis will add this to the agenda for the meeting with the Chief Master.

5.	SARS
	<p>Mr. Williams (SARS) present and welcomed by Ryno Venter.</p> <p>Most of staff in estate area, working from home. No change with 3rd wave looming. As a result, access to the Master's Office is limited.</p> <p>Audits being done on estate duty files. Members are urged to provide the requested documents to the auditors as soon as possible.</p> <p>In terms of turnaround times, they are a bit behind – currently dealing with middle of April correspondence.</p> <p>Wasfie responded to Nicolaas with regard to all queries raised with him.</p> <p>Questions by members:</p> <p>Barbara Segalla: Is Mr Rupert Kent still with estate duty team? Estate duty assessment has been outstanding since March. <i>Yes he is, been out of office for a few days, but back in the office.</i></p> <p>Brenton: Can Wasfie expedite EDA? <i>Yes this is his area of work, please refer all queries to nicolaas.</i></p> <p>How long should it take? <i>Will take a while if all documents not provided. If all documents are provided, should be finalised within a week.</i></p> <p>Do you issue EDA without post death taxes being finalised? <i>Yes, but a clearance letter will not be issued until all taxes are finalised.</i></p> <p>Suzette: How long before the case is give to an auditor? Generally speaking within a week of receipt, but currently at a back log and they are working on middle of April.</p>
6.	BANKING INSTITUTIONS
	<p>Ryno Venter advised he will be handing this national portfolio over to Denise Perkins.</p> <p>Issues with all 5 major banks. Complaints received on a daily basis. There is a process to be followed on the FISA website. Please use this escalation process. If no joy, please escalate to Ryno. He will still be assisting Denise until she has found her feet.</p> <p>Standard Bank has changed their process (again). Ryno will update this on the website. In the meantime, please forward matters to Ryno.</p>
7.	GENERAL
	<ul style="list-style-type: none"> • After attendance, a certificate is mailed to all attendees for CPD purposes. It is your responsibility to print this, as it is not available indefinitely. Once meeting is archived, it is no longer available electronically. Registration for meetings is done on a system, as we do not have the manpower to do it manually. If you do not register for a meeting, you will not get an attendance certificate. If you attend online and it is credited with 3 CPD points (3 hours). We get the data of time logged on and off. Unless you have been online for 15 minutes less than the 180 minutes required. Some of our points are accredited by other bodies and we have undertaken to adhere strictly to their requirements. • FISA has a bursary trust, members can donate money to. The goal is to bring young professionals into the industry, looking at our social awareness campaign and transformation within the industry. A link on the website is in the pipeline and will be available in due course. • GG: still the same process as published about a month ago. System still offline. Do e-mail, ask for quote, pay, send proof of payment.

	<ul style="list-style-type: none">• Our member in charge of training has left the industry. He was responsible for arranging the CPD sessions. Nico Louw was proposed, and accepted the responsibility.
	CLOSING
	The meeting was closed, and members thanked for their attendance.
	A CPD session on POPI was presented by Johan Wamsteeker, from EasiPoPi followed by Tim Powell on exchange control changes to financial emigration which took effect 1 March 2021.