



THE FIDUCIARY INSTITUTE OF SOUTHERN AFRICA



WESTERN CAPE REGIONAL MINUTES
of the regional meeting held on
17 February 2022
at CR Louw Hall at Sanlam Head Office, Cape Town and via
GoToMeeting

1	OPENING																																																																		
1.1.	<p>Ryno Venter welcomed all members present to the last meeting of the year. He further covered the rules of the meeting via the GoToMeeting platform.</p> <p>The meeting has been opened.</p>																																																																		
1.2	<p><u>Attendees</u></p> <p>Online</p> <table border="1"><tr><td>Adele Germishuys</td><td>Mary Geale</td></tr><tr><td>Adrienne O'Shea</td><td>Mogamat Jarodien</td></tr><tr><td>Alida Brink</td><td>Morné van Niekerk</td></tr><tr><td>Alysha Heyns</td><td>Najma Parker</td></tr><tr><td>Ann Nel</td><td>Nandi Sauer</td></tr><tr><td>Antoinette</td><td>Nerisha Radhella</td></tr><tr><td>Barbara Segalla</td><td>Nicholas Yeowart</td></tr><tr><td>Baron Naude</td><td>Nico Louw</td></tr><tr><td>Beverley Jackson</td><td>Nina Loots</td></tr><tr><td>Carolina van Huyssteen</td><td>Pamela Moses</td></tr><tr><td>Ceris Field</td><td>Paula Bongers</td></tr><tr><td>Corne Nunns</td><td>Peta Sickle</td></tr><tr><td>David Wangai</td><td>Rene Swart</td></tr><tr><td>Deon van Vuuren</td><td>Renette Rauch</td></tr><tr><td>Dick Miles</td><td>Richard William Draper</td></tr><tr><td>Elmien Pols</td><td>Rita Mendes-Abreu</td></tr><tr><td>Elna Van der Walt</td><td>Rob Picard</td></tr><tr><td>Engelize Hitchcock</td><td>Rodney Koen</td></tr><tr><td>Fiona McKend</td><td>Roegshana Samaai</td></tr><tr><td>Fiona Store</td><td>Sandy de Wet</td></tr><tr><td>Francois Snyman</td><td>Sarah Love</td></tr><tr><td>Francois de Jager</td><td>Sean Beagley</td></tr><tr><td>Gerhard Lourens</td><td>Sean Johnston</td></tr><tr><td>Grant Louw</td><td>Sharon Stanton</td></tr><tr><td>Herman Mulder</td><td>Sonja Linde</td></tr><tr><td>Lelhaam Pegram</td><td>Sonja Viljoen</td></tr><tr><td>Inge Heath</td><td>Suzette</td></tr><tr><td>Jacques Potgieter</td><td>Tanya Lochner</td></tr><tr><td>Jan van Zyl</td><td>Theresa Ehlers</td></tr><tr><td>Jemima Gain</td><td>Theresa Tannous</td></tr><tr><td>Johann de Vos</td><td>Tim Bellairs</td></tr><tr><td>Karen Carstens</td><td>Tiny Carroll</td></tr><tr><td>Karen Lotter</td><td>Tonya Barnard</td></tr></table>	Adele Germishuys	Mary Geale	Adrienne O'Shea	Mogamat Jarodien	Alida Brink	Morné van Niekerk	Alysha Heyns	Najma Parker	Ann Nel	Nandi Sauer	Antoinette	Nerisha Radhella	Barbara Segalla	Nicholas Yeowart	Baron Naude	Nico Louw	Beverley Jackson	Nina Loots	Carolina van Huyssteen	Pamela Moses	Ceris Field	Paula Bongers	Corne Nunns	Peta Sickle	David Wangai	Rene Swart	Deon van Vuuren	Renette Rauch	Dick Miles	Richard William Draper	Elmien Pols	Rita Mendes-Abreu	Elna Van der Walt	Rob Picard	Engelize Hitchcock	Rodney Koen	Fiona McKend	Roegshana Samaai	Fiona Store	Sandy de Wet	Francois Snyman	Sarah Love	Francois de Jager	Sean Beagley	Gerhard Lourens	Sean Johnston	Grant Louw	Sharon Stanton	Herman Mulder	Sonja Linde	Lelhaam Pegram	Sonja Viljoen	Inge Heath	Suzette	Jacques Potgieter	Tanya Lochner	Jan van Zyl	Theresa Ehlers	Jemima Gain	Theresa Tannous	Johann de Vos	Tim Bellairs	Karen Carstens	Tiny Carroll	Karen Lotter	Tonya Barnard
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Lauren Hean	Valma Kruger
Laurette Koen	Vannessa Nicholas
Liezel Clark	Warren Wilkinson
Londiwe Mthethwa	Waseemah Douthie
Louis Benade	Wasfie Williams
Louis Janse van Vuuren	Wilhelmina Erasmus
Louis Malherbe	Wilmi Engelbrecht
Madeleen van Schalkwyk	Yasmin Jadwat
Mari Steenekamp	Yvonne de Beer
Mark Harris	

Physically

Alfie Bester	Lynn Louis
Brenton Ellis	Madeleine Abrahamse
Chris Murphy	Melissa Medea
Gerhard Voges	Nicholas Yeowat
Ilze Voges	Nicolaas Brink
Janine Welgemoed	Phia van der Spuy
Jenny Barfoot	Ryno Venter
Karen Lotter	Sankie Morata
Liezl Kritzinger	Sielme van Tonder
Louis van Vuuren	Solomon Daniels
Louise Danielz	

1.3

Apologies

Olivia de Freitas	
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Ryno gave Jenny Barfoot from Hollard, the meeting main sponsor, an opportunity to speak before we proceed with the rest of the meeting. Their main products are tailor-made for fiduciary industry, namely Bonds of Security, asset insurance and professional indemnity insurance, for professionals and non-professionals. Please contact Jenny jennyb@hollard.co.za should you require any assistance or speak to her physically after the meeting

Les-Lee Peens from Shackleton, the meeting Exhibitor, does bonds of security and personal insurance cover. She can also be contacted at les-lee@srisk.co.za for any information.

2 MATTERS ARISING FROM PREVIOUS MINUTES AND CONFIRMATION OF MINUTES OF PREVIOUS MEETING

Ryno requests if there are any changes to be made to the previous Minutes of Meeting (2021/11/25). Nothing further to be added by attendees from the Audience or online. The approval of the minutes was proposed by Alfie Bester and seconded by Nicolaas Brink. Minutes of previous meeting were therefore confirmed.

3 MASTER'S OFFICE

Mr. Mbawana is present at meeting as representative of the Master.

He is not going to talk about the challenges. They've set targets as follows:

1. To clear normal backlog on all files within 8 weeks; and
2. To clear fast track files in 2 weeks.

Further problems they are experiencing: capturing over 200 new files. Only one individual attending to this. Plan to add 3 more individuals. They are further in the

process of employing a new project where members and stakeholders get involved and help out at the Master's office. Currently 3 companies have agreed to send representatives (Sanlam, ABSA and Servo). This project will start next week Tuesday and Wednesday.

Question and proposal from Brenton Ellis: Will the project tackle only new matters or existing matters only? Mr. Mbawana confirms both. Further, if more stakeholders want to assist, it will be best to create a schedule to prevent too much representatives arriving on the same date and time.

Mr. Mbawana confirms that the Master further has a national meeting coming up with FISA. Request to have regional meetings before national to enable the Master to discuss regional meeting matters at national level. Brenton confirms that there might be a misunderstanding as to why the regional meetings are held. Regional meetings are held to obtain feedback from the Master and their challenges in general and not necessarily to discuss specific matters.

Louis Janse van Vuuren further confirms that formal meeting will be held with Chief Master next week. Meeting at higher level. All Masters offices in SA in general will be discussed and the challenges they face (and not specific Master's offices). A number of stakeholders will be present e.g SAICA, SAIPA, LSSA etc.

Ms. Agulhas will also not be attending our regional meetings anymore and instead FISA will be invited to stakeholder meetings at the Master's offices.

Questions posed by members

1. Barbara Segalla – Please ask why we have to send paper to the Master's office when everything has to be captured on the system. Thanks

2. Wilmi Engelbrecht – Some estates have what is called a "pre-number" so it means that it was already captured, but no LE issued as yet. What will happen with these estates?

3. Tonya Barnard – I had 3 estates with no estate numbers but not on the system since middle January. 1 LE has been issued, 1 I enquired about again today and Me. Agulhas promised me the last 1 will be attended to by next week. Seems to be in line with the backlog addressed.

4	SARS
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Mr. Williams (SARS) initially informed FISA that he will not attend today however he later joins the meeting and apologises for being late. Nicolaas Brink confirms that there are no further matters from his side.

Mr Williams is responsible for estate assessment and audit area. Please refer outstanding matters to Nicolaas. Nicolaas is the liaison and members are requesting to refer SARS concerns to him: nicolaas@curoaccounting.co.za. Do not email Mr. Williams directly.

Mr. Williams:

1. In response to most of the questions posed by members, Mr. Williams confirms that requests for DEC letters must be in the correct format and you must attach the correct documents. Further encourages all FISA members to make use of the online systems for the uploading of documents, scheduling of meetings etc.

2. Requests by members are being dealt with separately by each province according to the location of the matter. They had a committee meeting in January and turnaround times appear to be good with no problems. There are further to many entry points online so requests are being dealt with on a first come first serve basis; and

3. Training tools are being launched in March 2022 and Mr. Williams is facilitating this himself;
4. There is a difference between updating registered representative details and coding an estate; and
5. In general all matters and cases are up to date (2 cases that Mr. Williams knows of that are outstanding and stakeholders will be contacted in this regard).

Questions posed by members

1. Paula Bongers – I am having trouble with requesting DEC from SARS. I am using the contact email and then we get a case number. Then we just get another email saying that you must upload your documents, and then when you try to do this, it says the case number is incorrect. Any ideas how to fix this – Mr. Williams confirms that this is strange and he will investigate. Paula can send details to Nicolaas that will in turn provide to Mr. Williams
2. Tonya Barnard – Please provide a list of documents for DEC requests. Answer: There is a full list on the SARS website.
3. Wilhelmina Erasmus – I code my estate with SARS and receive my acknowledgement from them but when the tax practitioner wants to submit the returns SARS says they cannot because there is no executor. What might the problem be? – Mr. Williams confirms that this problem has been identified and they are working on a solution
4. Barbara Segalla – The registered representative issue is even more of a problem as it rarely works – Mr. Williams confirms response to Wilhelmina and states that the concerns have been raised internally. He however confirms that the registered representative details should update automatically (except where a new appointment as representative is made)

5

BANKING INSTITUTIONS

Ryno Venter confirms that this portfolio has now formally been handed over to Denise Perkins (Eastern Cape). Please direct all future requests in this regard to her directly. will forward to Denise.

Feedback regarding from the banks through the FISA channel has in general been good.

Questions posed by members

1. Wilhelmina Erasmus - Nedbank werk nie
2. Paula Bongers – All the banks are vrot
3. Sonja Linde – Please provide channel info for ABSA and Standard Bank. Both are on the FISA website. Specific issues can be sent to Donice Perkins.
4. Louis Malherbe – We are meeting with Nedbank on the 9th of March to propose an automated system for the requesting of COB's, IT3b's and bank statements. We will demo a system to them on the day. FISA Support may help us getting it through easier.
5. Yvonne de Beer - Has anyone had any luck with FNB's website "report a death". Is it quicker to go this route than to email them? Answered by Ryno: I did not get any joy through this route and am still mailing them.

6	FISA WESTERN CAPE COMMITTEE ELECTIONS
	<p>Ryno Venter confirms that it is 21 Days until Annual General Meeting (AGM) where the new committee and structure will be formally approved. New proposals and nominations for committee members therefore needs to take place today. 5 Positions are available: Chair, Vice-Chair, CPD and Education, Marketing and Functions and Secretary. Nomination are as follows:</p> <ol style="list-style-type: none"> 1. Chair - Ryno Venter's office as chair ends on 2022/03/15. He will automatically become available for re-election if no one objects. Nicolaas Brink proposes re-election of Ryno and Rob Picard seconds; 2. Vice-chair – Ryno Venter proposes Nico Louw and member of the audience seconds; 3. Secretary – Robert Picard proposes Karen Lotter for another term. Wilmi Engelbrecht seconds; 4. CPD and Education – Ryno Venter proposes Alfie Bester and Nico Louw seconds; 5. Marketing and Functions – Ryno Venter proposes Liezel Clarke and member from the audience seconds. <p>Questions posed by members</p> <div style="border: 1px solid black; padding: 5px;"> <p>1. Barbara Segalla – Are the Master's and SARS liaisons not on the committee? Ryno Venter confirms that even though they are not formally appointed for a specific role on the committee, they are nonetheless part of the committee through their role as liaisons.</p> </div>
7	GENERAL
	<p>Louis van Vuuren confirms that he has received numerous requests from members that did not receive the online link to join the meeting. To remedy the situation in time, he requests that members inform him in advance and not minutes before the start of the meeting. Comments from members general – Look in the spam folder of your inbox as the link sometimes ends up there.</p> <p>Questions posed by members</p> <div style="border: 1px solid black; padding: 5px;"> <p>1. Ann Nel – in response to technical difficulties – May I ask to sort out the technical challenges in the future before meetings because we waste a lot of time. I missed the whole Master session because of terrible sound. Ryno Venter answered by urging members to rather attend the meeting physically if at all possible as we cannot cater for instance where the Master's representative spoke very softly nor internet connections to the audience online where the sound quality may be less than good.</p> </div>
8	CLOSING
	<p>The meeting was closed, and members thanked for their attendance</p>
	<p>The CPD session follows and is presented by Willem Lategan from RIG</p>