



THE FIDUCIARY INSTITUTE OF SOUTHERN AFRICA



## **Minutes of Regional Meeting of the Fiduciary Institute of Southern Africa held virtually on 18 May 2022**

### **WELCOME**

- By Carmen

### **APOLOGIES**

Hilary Dudley

Paul Canter

Ms Moathludi (Master, Pmb)

### **ATTENDEES**

- i) 34 members were in attendance
- ii) MOHC Durban: Mr Edric Pascoe (Master, Dbn)
- iii) SARS: Muhammed Jagot, Ben Pillay
- iv) Hollard: Ms Jenny Barfoot

### **NEW MEMBER**

There have been no new members in the last two months

### **BY INVITATION:**

- i) Master's Offices: MOHC Durban and Pietermaritzburg
- ii) SARS representatives
- iii) Hollard
- iv) Shackleton Risk

	<b>ITEM</b>	<b>ACTION</b>
<b>1.</b>	<b>OPENING</b>	
1.1	General welcome by Chair	
1.2	Minutes of previous Meeting:	

1.3	Accepted by: Adele Van Den Bergh Seconded by: Rumana Mahomed  Hollard Presentation: 2 product lines being Court/Executor Bonds and Asset Insurance.	
2.	<b>MOHC</b>	
	<p><b><u>Durban: Mr. Edric Pascoe</u></b></p> <ul style="list-style-type: none"> <li>- Expect delays: applied prior to financial year end for overtime budget and it was rejected, have reapplied and it is still under consideration.</li> <li>- Implemented new system i.e. ringfenced backlogs: a special team is tasked with dealing with all new matters lodged from as at 1<sup>st</sup> of April applying a 21 day turnaround time.</li> <li>- Historical matters are being dealt with by all staff mainly to stop fraud and allocate the backlogs.</li> <li>- S42(2) still to be lodged on 4<sup>th</sup> floor and sent to the relevant AM or EC. Turnaround time is 7 days.</li> <li>- Backlogs of L&amp;D Accounts are moving along fairly well.</li> <li>- Registry Control has been restructured. The registry clerks now fall under the direct control of their respective Assistance Master in regards to Accounts and Appointments. Main Registry deals only with general correspondence and copies.</li> <li>- Wills: process remains as per last meeting i.e. the Will must be delivered to the Will's room and if the staff are not there then deliver to the Office Manager, Mr Zungu or as directed on that day.</li> <li>- Urgent matters: spouse reliant on money in the bank; monies are urgently required.</li> <li>- Appeal by Master: Communicate your issues directly with the Master before going to Court, effective communication will escalate the matter.</li> <li>- In relation to future regional meeting attendance, preference is hybrid meetings.</li> </ul>	ALL MEMBERS
3.	<b>SARS</b>	

	<ul style="list-style-type: none"> <li>- Ben Pillay to be contacted on all problematic SARS queries</li> <li>- Aaron to provide Ben with contact details of SARS official at National Office.</li> <li>- No other issues were raised with Ben or at the meeting.</li> </ul>	
<b>4.</b>	<b>GENERAL</b>	
4.1	<p><b><u>Registration</u></b></p> <p>Protocol: Members must register and log in with their names so that certificate of attendance can be issued.</p> <p>Membership certificates that have not as yet been received will be send out by the end of the year. Delay caused as a result of higher volume</p>	
4.2	<p><b><u>Online conference v physical conference:</u></b></p> <p>Members were asked to vote which they prefer.</p> <p>Carmen undertook to send out a survey for all to indicate their preference.</p>	
4.3	<p><b><u>MENTORSHIP PROGRAMME</u></b></p> <ul style="list-style-type: none"> <li>- Daniel Marsh gave a general overview on the status of the mentorship program and that it is going well and proved to be beneficial. Members were encouraged to join as Mentors and/ or Mentees</li> <li>- Considering publishing a Quarterly Newsletter with a summary of the case studies as well as any discussions of interest.</li> <li>- Muhammed Jagot provided his input as a Mentor and the value that the discussions had for him. Encouraged members to join as Mentors.</li> </ul>	

<b>5.</b>	<b>CLOSING</b>	
	Floor open but no other questions or issues were raised. Meeting was closed at 11h30. All members were to return at 12h00 for the CPD session.	
<b>6.</b>	<b>CPD SESSION – Focus on Jersey cases with other foreign law cases: Trusts</b>	
	Mr Henry Wickham Counsel and Notary Public Ogier (Jersey) LLP	