



## **GS: Estates**

# Contents

1. Escalated Matters
2. Process Matters
3. Education and Engagement
4. SARS Digital Resources

# Escalated Matters

- No outstanding matters

# Process Matters

## ❑ Escalations cases

- All returns until date of death, signed copy of L&D and updated banking details must be submitted to enable speedy finalization.
- Only when all taxes ( VAT, PAYE, SDL, UIF and Estate Duty) have been finalized can the executor request for the DEC.
- Taxable income after date of death, the deceased estate needs to be registered for a second tax reference number (applies to estates after 1 March 2016).

## ❑ Updating Representative Taxpayer

- Part of the coding process of a deceased estate is to verify the RR details a video is available on YouTube  
(<https://www.youtube.com/live/TcWyWYVOhOU?feature=share>)

# Education and Engagement

## ❑ Education Workshop

- The Estate Segment hosted a Webinar on the Administration of Deceased in December.
- Topics relevant to be covered on You Tube interventions

## ❑ Online Survey

- Completed – busy compiling the outcome report

## ❑ Informational Documents

- Administration of Deceased Estate Presentation
- FAQs from Administration of Deceased Estate Webinar

# 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) (tax practitioners)
  - [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*