



## **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

- Submission of signed L & D accounts
- Required documentation when coding cases
  - ✓ Death notice of the deceased (Form J294)
  - ✓ Letter of Executorship (Form J238)
  - ✓ Undertaking and acceptance of the Master's directions (Form J155) or Letter of Authority (Form J170 - <R250 000)
  - ✓ Inventory (Form J243)
  - ✓ last will and testament
  - ✓ Certified copy of the ID of the deceased person and executor name
  - ✓ Physical address, e-mail address and telephone number of the executor or his or her agent
  - ✓ Signed final L&D accounts when available (if applicable)
  - ✓ The Estate Duty Return (REV267 form – applicable)
- Submission of estate returns
- Outstanding information (L&D, CGT info, returns, banking details...)

# Education and Engagement

## ❑ Education Workshop

- How to report estate to be available on YouTube soon
- Topics relevant to be covered on YouTube interventions

## ❑ Informational Documents

- Dispute process <https://youtu.be/uBVDU1qbR9w>
- Auto Assessments [How does Auto-Assessment work | South African Revenue Service \(sars.gov.za\)](https://www.sars.gov.za/assessments/how-does-auto-assessment-work)

# SARS Digital Resources

- ❑ Contact Centre Number: 0800 00 7277
  - Between 08:00 and 17:00
  - Excluding weekends and public holidays
  
- ❑ Email ([Estate name, tax number, estate number and id number 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)
  
- ❑ 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*