



GS: Estates

Contents

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

Escalated Matters

Banking details

- all matters escalated have been resolved. The problem with Investec and Grindrod Banks have been addressed

Coding Matters

- all matters escalated has been resolved

Process Matters

❑ L&Ds

- SARS only accepts signed L & D accounts (draft L&D are no accepted)

❑ DEC request required document not submitted

- Signed L&D
- Outstanding returns
- Banking Details not updated

❑ Dutiable cases creation

- Audit cases will no longer be created for estates with outstanding returns

❑ Second entity numbers

- If post income applicable it is executor's responsibility to request number on e-Filing or at Branch(booking required)

Education and Engagement

❑ Education Workshop

- How to report estate <https://youtu.be/x-zuwQS2gSo>
- Topics relevant to be covered on YouTube interventions

❑ Informational Documents

- Supporting documents required for updating estate banking details
[Supporting documents for banking details | South African Revenue Service \(sars.gov.za\)](#)
- Guide to individual ITR12 Return for deceased and insolvent estates (provided to Penelope)

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 (non-dutiable estates)
 - Estateduty@sars.gov.za (dutiable estates)
 - pcc@sars.gov.za (tax practitioners)
 - 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*