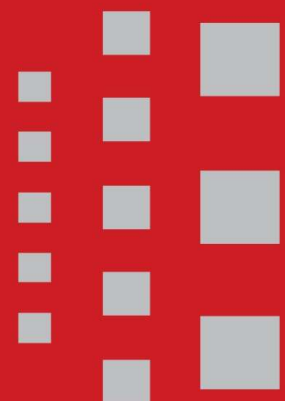




THE FIDUCIARY INSTITUTE OF SOUTHERN AFRICA



- **Procedures in Master's Office**
- Deceased estates (appointments and examination of accounts)
- Inter vivos Trusts
- **Challenges in Master's Office**

- **Deceased estate appointments**
- Generally regulated by CMD 9 of 2023
- Turnaround time 15 working days (**SMS: 21**)
- Two options: Online registration system or the old manual registration system
- Online
- You will receive either an e-mail or sms as proof of submission

- Any enquiries from Master (J84) will be received electronically
- Appointment letters will be received electronically or on portal
- Will and bond of security (if required) must be submitted manually

- Old manual system
- To receive proof of delivery of documentation is problematic
- Will receive sms as proof of submission, only once matter is captured on ICMS
- Benefit – all reporting documents submitted in one batch
- Will receive sms as confirmation that appointment was issued, but no appointment letter via electronic media

- General aspects in respect of deceased estate appointments
- Old manual system registrations (not fast lane/helpdesk matters) are normally sorted in terms of testate and intestate matters
- Testate matters – the will must first be accepted by Master
- After acceptance – copy of the will must be made for file / original will stored in strongroom

- Thereafter files are distributed to various groups
- Intestate files distributed immediately
- Critical to send correct documentation the first time
- Online system – the will still needs to be accepted by Master and then dealt with as explained above



- Online estate reporting is best option for Fisa members

- **Deceased estates: examination of accounts**
- Registration department will distribute accounts to groups
- Assistant Master will distribute accounts to Estate Controllers
- New accounts and amended accounts – procedure the same
- Turnaround time 15 working days

- **Inter vivos Trusts**
- Generally regulated by information on Master's website
- Turnaround time: 21 working days
- Two options: Online registration system (currently only Johannesburg and Pretoria Master's offices) or the manual registration process
- Online – similar to deceased estates online (CMD 2 of 2025)

- Online system caters for registration of new trusts, amendment of existing trusts (back to 2008), termination of trusts and automatic updating of beneficial ownership register

- **Challenges in Master's Office**
- Unstable network is still a big challenge – downtime of systems and e-mails
- OCM in process of procuring LTE routers and data cards
- Establishment still in terms of 2006 data.
- Vacancies – are now filled
- DHA verification – stability is much better than before

- PIVA system replaced Movit and Hanis previously used for verification. Seems to work well
- Cape Town – backlog with regards to deceased estate appointments, as well as trusts
- OCM currently attending to backlog in deceased estate appointments. Two different task teams to deal with online and manual. Started early August 2025

- Online backlog to be cleared by 30 September
- Pretoria – backlog with trusts, mainly due to previous issues with Metrofile and now Veritas Scanning Solution