FIDUCIARY AND TAX SERVICES

Looking to enhance your wealth strategy with a custom-crafted fiduciary and tax plan? Based on your personal circumstances and objectives, we will provide expert advice. We'll also set up and manage the appropriate local and offshore structures, and assist you with the administrative requirements.

Our comprehensive range of integrated services includes:

LOCAL AND OFFSHORE TAX ADVICE AND STRUCTURING

The global tax environment is ever-changing. Our team of world-class experts stays up-to-date with this critical aspect of your wealth management across multiple jurisdictions – so you don't have to. We provide advice on all tax-related matters, such as:

- Complex structures and restructuring of assets
- Individual, trust and company taxes
- Situs taxes
- Emigration and immigration, foreign earnings and the application of double taxation agreements
- SA Reserve Bank regulatory issues
- Potential tax consequences and reporting obligations if you hold a US passport or green card, or if you have children living in the US
- Establishment and management of charitable organisations, their tax status and tax deductible donations
- Financial implications of life-changing events, such as marriage, divorce and the birth of children.

GLOBAL ESTATE PLANNING

We can assist you with all aspects of estate planning and winding up your estate, both within South Africa and across jurisdictions, including:

- Local and offshore estate planning
- Advice on the orderly transfer of your assets to the next generation
- Local and offshore inheritance taxes
- Drafting and reviewing of local and offshore wills
- Safekeeping of deeds of title, original trust documents and share certificates where we hold the original will in safe custody
- Executorships and administration of deceased estates
- Power of attorney to administer offshore estates.

LOCAL AND OFFSHORE TRUST AND COMPANY MANAGEMENT SERVICES

We provide independent trust and company management services, and fund administration to private, corporate and institutional clients around the world. These services include:

- Company and trust formation
- Company secretarial services
- Corporate trustee services
- General administration and accounting
- Offshore administration and accounting
- Drafting of trust deeds
- Provision of independent trusteeships
- Trust deed reviews and amendments
- The creation of BEE, charitable, special and Shariah trusts.

ADMINISTRATIVE TAX AND ACCOUNTING SERVICES

Our range of specialised support services helps to ease the administrative burden. We can assist with:

- All aspects of personal income tax
- Submission of annual tax returns for individuals and trusts
- Provisional tax returns for individuals, companies and trusts
- Deceased estate tax returns
- Annual financial statements for trusts
- Tax compliance for individuals and trusts.

OUR EXPERT TEAM

Our fiduciary and tax team has a proud track record of meeting – and exceeding – our clients' expectations.

HEAD OF FIDUCIARY & TAX

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