

ESTATES TRUSTS and WILLS, Solutions for Attorneys



SERVO FIDUCIARY SERVICES (PTY) LTD

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Servo Fiduciary Services has built a strong reputation for delivering experienced fiduciary services to individuals, professionals and financial advisors.

ESTATES TRUST and WILLS, solutions for attorneys, is a service created to assist attorneys to do fiduciary work in the quickest and most efficient manner.

Member of



ESTATE ADMINISTRATION

Solutions

Simplifying the role of executor

In most cases attorneys acting as executors personally attend to the administration of the estates to ensure the retention of their clients and fees. The process of settling deceased estates can be a frustrating task for the professional with substantial responsibilities who may find it easier to delegate the process, rather than handle it alone.



Servo Fiduciary Services (Pty) Ltd (SFS) has experienced estate administrators and provide a service that can assist professionals in effectively settling the estate, freeing them to attend to other matters. Working with SFS will offer you several important advantages:

- **Retention of clients and fees:** SFS will ensure that the relationships between the attorneys and their clients are maintained and that the attorney still receives a competitive share of the executor's fee.
- **Service focused on your needs:** We can provide the following services that can be tailored in the way that works best for you:
 - Comprehensive administration of deceased estates and corresponding with the beneficiaries.
 - Only serving as administrator (back office) while the attorney has the contact with the beneficiaries.
 - Reporting of deceased estates and obtaining letters of executorship at the Master's office.
 - Finalisation of estates that is currently under administration by attorneys.
 - Application for professional indemnity insurance.
- **National and global scope:** SFS has personally attends Master's offices and can assist with estate administration anywhere in South Africa. We can also assist with the administration of estates of South Africans in foreign jurisdictions.
- **Impartiality and protection of clients:** We offer compassionate attention to the needs of clients and insure that the identity of clients are protected. We offer an objective approach to finalise estate in the most efficient manner and we do not offer any financial advice or sell any financial products.

TRUST SERVICES

Solutions

Simplifying trust services

The degree of complexity surrounding trusts cause that many professionals will only go as far as drafting trust deeds for their clients.

SFS offers various trust services that can be utilised by professionals to improve their level of service to their own clients. SFS can provide the following services that can be tailored in the way that works best for the professional:

- Drafting, amendment and registration of trust deeds
- Proof reading of trust deeds
- Commenting on the wording of trust deeds, e.g. divorce cases
- Trust administration, completion of trust income tax returns, trustee meetings, resolutions etc.
- Acting as professional independent trustee, e.g. in a case where there is a conflict of interest to act as Trustee



Trust Services.

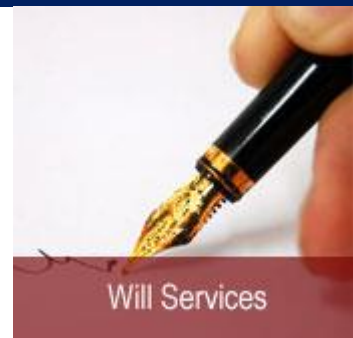
WILLS SERVICES

Solutions

Wills services

Servo Fiduciary Services (Pty) Ltd (SFS) specialises in the drafting of Wills and can offer the following services to Attorneys:

- Preparation and labelling of Will application forms for Attorneys
- Template Wills
- Drafting of Wills
- Proof reading of Wills



Will Services