


Fiduciary Services



Estate administration benefits



Let us help you to draft your will and administrate your estate so that you can have the peace of mind that your affairs are in good hands.

| About us

At Sanlam, we are dedicated to helping you draft your will and administrate your estate. And we do it with commitment, because we believe that an inheritance is about more than money. To us it's about leaving your legacy and having the peace of mind that those you leave behind will be provided for. That's why we treat your affairs with the proper care and respect it deserves. It's what makes us Wealthsmiths™.

Why Sanlam?

We have a proud tradition of providing our clients with a comprehensive and caring service. We are always geared to take you one step further. Our dedicated team can guide you in the drafting of your will, and in the administration of your estate. We also have a network of selected specialists who will take the puzzle out of estate planning.

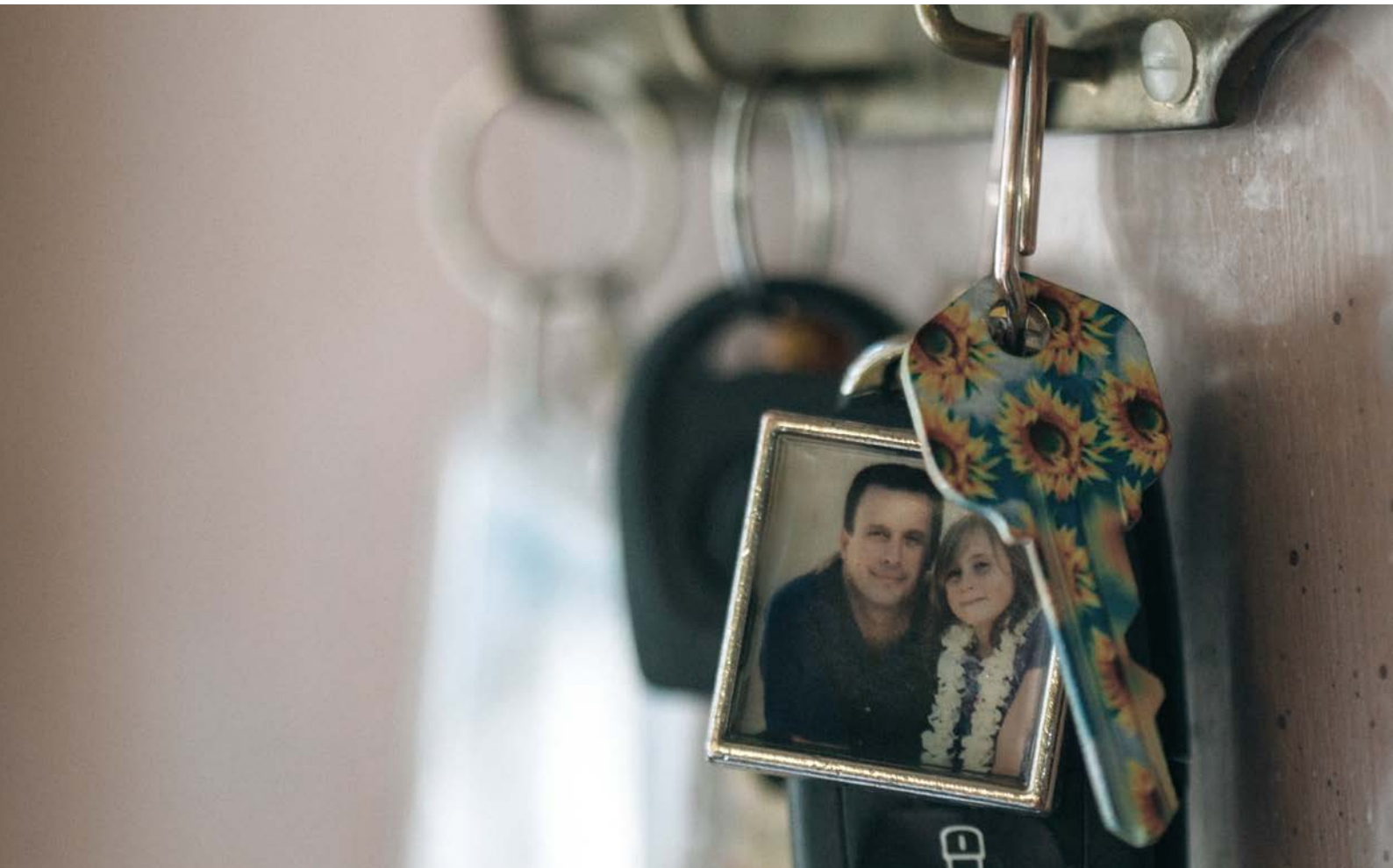
We offer you:

- ④ Competitive rates with a quotation for the administration of an external estate.
- ④ Estate-reporting documents on our website.
- ④ Fixed bank charges on Estate Late cheque accounts.
- ④ Competitive interest rates on Estate Late cheque accounts.
- ④ No advertising costs for auctions if you use a preferred provider.
- ④ Access to bridging finance.
- ④ A sophisticated estate administration programme, which provides for capital gains tax and estate duty calculations.
- ④ Cross-checking of the liquidation and distribution account and annual spot-check audits which are backed by the Sanlam Group.
- ④ Guaranteed continuity during the administration process.
- ④ Electronic third-party payments.
- ④ Access to specialist medical and short-term insurance advice and products.
- ④ Timeous and regular communication during the administration process.
- ④ An annual client satisfaction survey.
- ④ An estate department that keeps abreast of industry/statutory changes via SARS/the Master's Office.



Your estate in capable hands

Our skilled and experienced team prides itself on finalising the administration of each individual estate quickly and successfully. We follow a continuous control process, which includes internal and external audits, to ensure that you leave a legacy with peace of mind.



Contact details

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