



Legatee
Trust Services
· Wills · Estates · Trusts ·

At Legatee Trust Services (Pty) Ltd, our management team have more than 100 years of combined experience in the fiduciary industry. We are experts in Deceased Estate Administration, Trust Administration and Will Drafting Services. We offer a bespoke service to all our clients and ensure seamless, end-to-end administration.

Honesty, integrity, loyalty and moral obligation are the foundational values on which our business is built, and with a consistent and deliberate focus on these values, we can best serve our clients.

Our services are provided in total confidentiality and are tailor-made to suit our client's needs. We pride ourselves on our proven reputation and our impeccable conduct. We believe in building long-term working relationships, to ensure we always deliver unparalleled service and responsiveness, which help us achieve outstanding results.



Our Vision

Our vision is shaped by the past, present and future: a legacy of solid foundations, technical knowledge and expertise, the boldness to take on today's global challenges with an innovating and encouraging spirit in an ever-evolving regulatory environment and the fresh ambition to



Our Mission

We earn our trust by staying true to our fiduciary heritage and by providing differentiated, exceptional customised service. Our market-leading technological capabilities and cloud-based solutions deliver personalised fiduciary services—allowing us to deliver the highest level of service to our clients

We believe in doing more so that our clients can too.



Our Promise to you

Our commitment is to provide you with quality communication, service and support. We will provide you with the highest levels of service in all that we do. This is our service commitment to you, infused into every aspect of our business; from our ethos to the training of our people and the development of our relationship with you.



Services and Product Offering

Will drafting & will safe custody services

A professionally drafted will ensures that an estate is easily distributed to your nominated beneficiaries. This is an essential document required by people wishing to avoid the rules of intestacy.

All original wills are stored in a vault that is fireproof, weatherproof, and waterproof. In addition, an original, signed copy is stored offsite.

At Legatee Trust Services, we offer **FREE** will drafting services, tailor-made, to suit client's specific needs. All our wills are stored at our vault, **FREE** of charge (this service is free of charge when Legatee Trust Services is nominated as the executor).

Deceased estate administration services

The executors manage the deceased's estate, pay all debts and distribute the assets according to the will (or, if there is no will, according to the law of Intestate Succession). The executors' duty is to safeguard the assets and look after the interests of the people who will ultimately receive them (the beneficiaries).

At Legatee Trust Services, we are experts in deceased estate administration and offer a bespoke service to all our clients.

Trust administration: Inter vivos, Testamentary, Medical Negligence & Road Accident Trust Services

A trust is a fiduciary relationship in which one party, known as a founder, gives another party, the trustee, the right to hold title to property or assets for the benefit of a third party, the beneficiary.

Legatee Trust Services and associates are experts in trustee and trust administration services. We offer a bespoke service to all our clients.

Trust deed drafting services

A Trust deed is the founding document of the trust, which lays out the objective of the trust, instructions on how this objective should be achieved, key information about the founder, trustees and beneficiaries, and the powers and duties of the trustees and beneficiaries.

Legatee Trust Services and associates are experts at drafting customised trust deeds to suit your needs and are able to act as trustees if requested.



Legatee
Trust Services
· Wills · Estates · Trusts ·

Services and Product Offering

Estate planning services

Estate planning is an important step to take during your lifetime so that you, your family and other beneficiaries may enjoy and continue to enjoy the maximum from your estate and your assets during your lifetime and after your death.

At Legatee Trust Services, we have the necessary skills and capabilities to help you draft a comprehensive estate plan, **FREE** of charge.

Deceased Estate and Trust Tax Compliance Services

When someone dies, their estate will normally have to pay any tax due before any money is distributed to their heirs. The deceased could have paid too little or even too much income tax. As a result, the deceased's estate might owe tax to the government, or alternatively a refund back to the estate.

At Legatee Trust Services, we are specialists in deceased estate and trust tax compliance.





Legatee^{(PTY) Ltd.} Trust Services

· Wills · Estates · Trusts ·

Our Contact Information

Gauteng



+27 82 488 8473



+27 10 220 5231



Rohit@legateetrust.co.za



Suite 20, Private Bag X 9976,
Sandton, 2146



10 Paula Rd, Olivedale,
Randburg, 2188

Western Cape



+27 84 568 3991



Capetown@legateetrust.co.za



Private Bag 113, Postnet Flamingo Square,
Cnr of Study & Blouberg Rd, 7441

Kwazulu Natal

+27 72 349 2222



+27 31 502 6699



Jayshreep@legateetrust.co.za



P.O. BOX 1125
Umhlanga Rocks, 4320



go to our website



www.legateetrust.co.za

OR

send us an email



info@legateetrust.co.za

More than 70% of South Africans do not have a will, so we at Legatee Trust Services have a simple aim, to make a significant impact by educating our fellow people to #DO YOUR WILL.