

Individual  
Consulting



## Planning your estate

Protecting those you care for.



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# Your final wishes

**Your will is a legal document stating your final wishes on how you would like to distribute your assets and take care of your loved ones after your death.**

If you die without a will, legislation guides how your assets are distributed, meaning that those who eventually benefit from your estate might not be your preferred beneficiaries. Careful estate planning can also minimise the impact of taxes on your estate.



**To set up your will, you'll need a fully completed and signed application form.**

## Drafting wills

Whether you need a basic will or a detailed document covering business interests and international assets, we can draft it for you.

## Executing and administering estates

Proper administration ensures that your will is drafted professionally with care and insight, guided by focused expertise.

You can nominate us as executors of your estate, or we can act under power of attorney where a friend or relative is nominated as executor but has insufficient knowledge, expertise or time to carry out the executor's duties.

We'll administer the complete winding-up of your estate and ensure the safe transfer of assets to all beneficiaries - both local and international.

## Respecting your wishes

If a family member, friend or attorney notifies Alexforbes of your death, we will make sure the rest is dealt with according to your will.

## Setting up a trust

One way to minimise taxes and protect a child beneficiary is to transfer certain assets to a trust. Appointed trustees will manage and share those assets according to the trust deed, which is set up according to your wishes and in terms of the law.



## Your partner in estate planning

We offer global expertise and best practices in all areas of estate planning. This gives you peace of mind that your plan will be expertly implemented when you're gone.



## All standard Alexforbes wills are free.

If your needs are more complex, we can draft a customised will at a reasonable once-off cost. Examples of when a custom will is required could include business interests, forms, trusts and so on.

# Forming and administering trusts

If you choose to transfer assets to trustees to manage your assets for the trust's beneficiaries, we can set up and administer various types of trusts according to your needs:

- **Charitable trusts** for your favourite charity
- **Inter-vivos trusts** set up during your life to minimise individual estate duty in large estates
- **Testamentary trusts** are set up after your death as part of a request in your will. This helps to manage the assets you leave behind for children until they are old enough to control the assets themselves.

Our independent and professional trustees are responsible for making sure that the trust fulfills its intentions and provides the maximum benefit to its beneficiaries.

## The trustees responsibilities include:

- Investing assets on behalf of beneficiaries
- Determining beneficiaries' income and capital needs
- Ensuring they comply with the provisions of the trust deed
- Making sure the trust complies with legal requirements
- Managing the trust and running it according to best practice
- Giving advice on tax efficiency and financial topics



**To us, your estate planning is personal.**  
We aim to help you to bring your best wishes to life.

## Who we are

We guide individuals in protecting their money and assets by offering valuable advice relevant to their individual needs.

Alexforbes Fiduciary Services is part of the Alexforbes group, which has provided financial services for over 70 years. Our global footprint and strategic local and international alliances allow us to offer powerful services with a complete product and service offering.

Our team of experienced, qualified professionals have been handpicked to provide relevant, integrated management and administration services to trusts and individuals.

## Connect with us

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