



CHARTERED ACCOUNTANTS  
AND FINANCIAL SERVICES

## WILLS

### **DRAWING UP OF WILLS**

- giving advice on your will
- drawing up your will from a proper estate plan
- taking into account Estate Duty and CGT issues
- trying to be as practical as possible
- keeping it simple

### **ADVICE ON BEQUESTS**

- helping you to be practical
- using your business structures effectively
- using your primary rebate effectively
- using your spousal bequeath effectively
- protecting your minor children

### **ACTING AS EXECUTORS OR TRUSTEES IN DECEASED ESTATES**

- advice on who to appoint as executor
- advice on how to keep the costs low
- acting as executor or assisting the executor
- assisting with the winding up process
- handling all administration and correspondence with the Master in the winding up process
- giving you an upfront fee of what we will charge

### **PROPER SYSTEMS FOR SAFEKEEPING OF WILLS**

- we keep your original will in a central safe
- you get a copy of the will
- we have proper control over the movement of a will
- we ask no fee for safekeeping

### **REGULAR ASSESSMENT OF WILLS**

- we reassess your will on a regular basis
- you ask us to change your will when you think it is necessary
- we will revise your will at least every two years

### **OTHER ISSUES**

- we keep up to date with the latest legislation effecting your will
- we have proper systems in place
- we pay personal attention
- we do the job locally
- your will is important and should be treated accordingly