



**BESPOKE EXECUTOR SERVICES**  
Customised Fiduciary Solutions

# Customised Pricing and Concession Plan

## Website version

*(Keep it simple and focus on what matters. Don't let yourself be overwhelmed)*  
- Confucius

## **Value added tax (VAT)**

All our fees and charges are subject to VAT at the prescribed rate.

## **Our services**

(Click on the service to be redirected to the details and pricing)

A	Liquidity Analysis	B	Detailed Estate Planning
C	Deceased Estate Administration Services	D	Trust Administration Services
E	Will drafting & related services	F	Independent Trustee Services
G	Fiduciary Dispute Resolution	H	Deceased Estate Firearm Administration Services
I	Simulated Liquidation and Distribution Account		



<b>A</b>	<b>Liquidity Analysis</b>	<b>R1,250</b>
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BEXs prepares a liquidity check, based on the data submitted by the client and Financial Planner, enabling the client to establish if there is sufficient cash in their estate to fund liabilities, administration costs and cash legacies. The Financial Planner will then be able to provide the client with additional life cover in need.

<b>B</b>	<b>Detailed Estate Planning</b>	<b>R3,500</b>
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BEXs undertakes a comprehensive and detailed Estate Planning analysis, based on the data submitted by the client and Financial Planner. Armed with this analysis, the client can establish whether their estate divestment options are economical and tax efficient.

<b>C</b>	<b>Deceased Estate Administration Services</b>
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This service entails the end to end administration process undertaken by BEXs either as Executor testamentary or as agent for the Executor.

<b>Executors fee (based on market value of capital assets as at death)</b>	<b>Income collection fee</b>
Between 2,65% and 3,5%*	6%

\* Based on the nature of assets and envisaged administration process.



<b>D</b>	<b>Trust Administration Services</b>
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### Trust Deed Drafting

Where BEXs is appointed as a trustee	Includes	Excludes
R7,500	<ul style="list-style-type: none"> <li>Registration with Master of High Court</li> </ul>	<ul style="list-style-type: none"> <li>Courier fees</li> <li>Masters “runner fees”</li> <li>Masters Registration fee (approx.. R250)</li> </ul>

### Trust Ultimate Beneficial Ownership (UBO) Registration

Where BEXs is appointed as one of the trustees
R1,250



## **Trust legality auditing/reviewing and amendments**

Reviewing and auditing of trust deeds and accounting records requires a special skill and is labour intensive.

Contact [tonyr@bexs.co.za](mailto:tonyr@bexs.co.za) or [seanb@bexs.co.za](mailto:seanb@bexs.co.za) for a quotation.

## **Trust Administration**

This service entails the end to end administration process undertaken by BEXs either as Trustee or as Agent for the Trustee.

## **Testamentary, Inter Vivos and Settlement Trusts**

Set-up administration fee	Ongoing annual Administration fee*	Income Collection fee	Termination administration fee
R2,500	1%	6%	R3,500

- Based on gross capital assets under administration (subject to a minimum fee of R15,000 p/a), recovered monthly in arrears.
- Based on all income collected on Trust income.
- Tax registration and practitioner fees refer to a distinct charge imposed by the designated tax professional for their services.



## Inter Vivos Trust – Secretarial Services

These services include, but are not limited to: -

- Opening Bank account and monitoring movements for compliance and FIC purposes
- Attend to drafting and filing of all resolutions
- Trust record keeping
- Receiving signed and filing minute meetings
- Setting up meetings
- Attending a maximum of 4 (Four) meetings annually for the purpose of taking minutes
- Ensuring SARS registration and retaining documents
- Monitoring of Tax return submission and receipt of assessment
- Setting up and keeping Trust file up to date
- Setting up annual Trustee pack (which includes AFS, resolutions and minutes along with a compliance report)
- Attending to the compliance function of the Trust

Annual Fee
R10,000

E	Will drafting & related services
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## Will Storage Services

Ensuring that your original Will is safeguarded from fraudulent activity or from prying eyes. This service is free for **BEXs clients**.



## **Will drafting services**

This service is free when **BEXs** is appointed as Executor or Co-executor.

## **Living Wills**

This service is free to clients who have a **BEXs** drafted Will.

<b>F</b>	<b>Independent Trustee Services</b>
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Being a nominated or appointed trustee, comes with important, but often seen as, extraneous responsibilities that are misunderstood by the incumbent.

The tax consequences of not being independent or making decisions that are seen as alter ego trust decisions, can have dire financial consequences, often negating the very purpose for which the trust was set up.

BEXs provides the service of independent trusteeship, which will go a long way to making the decisions of the trustees, truly independent and open to scrutiny.

**Our participation as an independent trustee has many variables, so contact [tonyr@bexs.co.za](mailto:tonyr@bexs.co.za) or [seanb@bexs.co.za](mailto:seanb@bexs.co.za) for a quotation.**

<b>G</b>	<b>Fiduciary Dispute Resolution</b>
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Are you having a dispute with an Executor or Trustee? BEXs will assist our clients and trusted partners with these disputes.

Contact [tonyr@bexs.co.za](mailto:tonyr@bexs.co.za) or [seanb@bexs.co.za](mailto:seanb@bexs.co.za) for a quotation, as we will need to analyse the dispute and consider the work involved before quoting.



<b>H</b>	<b>Deceased Estate Firearm Administration Services</b>
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<b>Firearms Control Act Compliance Pricing</b>		
<b>Service</b>	<b>Standard Fee</b>	<b>Additional Firearms for the same estate</b>
Dealer Stocking Of Firearm	R1,100	R300
Destruction of Firearm (Inclusive of ammunition)	R1,100	R300
Reporting lost or stolen firearm	R1,100	R300
Deactivation of firearm	R1,100	R300
Deregistration of Wind Air Rifle or Gas Pistol	R700	R300
Motivation for a new firearm licence – Application includes the SAPS 271	R1,600	
Motivation for a new firearm licence –	R1,200	





Application excluding the SAPS 271		
Competency Certificate Application	R 950	Including SAPS Forms
Renewal of Competency Certificate	R 950	Including SAPS Forms
Additional Competency Certificate	R 950	Including SAPS Forms
<ul style="list-style-type: none"> <li>• The sale of firearms out of an estate is an agreement between buyer and seller and BEXs will only introduce the parties</li> <li>• Prices DO NOT INCLUDE courier fees for the transport of firearms between stakeholders</li> <li>• BEXs utilises the services of RAM couriers for the safe transport of firearms. As above these costs are additional to BEXs costs</li> <li>• If BEXs collects the firearm, a travel fee of R5,00 per kilometre will be an additional fee</li> <li>• In all instances BEXs will issue a quotation for the client to either accept or reject</li> </ul>		

## FIREARM SEARCH FEE

**FEE PAYABLE FOR SEARCH TO ESTABLISH IF DECEASED OWNED FIREARMS**

**R100 per estate**

**I**

### **Simulated Liquidation and Distribution Account**

BEXs prepares a simulated Liquidation and Distribution Account based on comprehensive information presented to BEXs, by the client or Financial Planner.



<b>All information provided and BEXs does not have to consult/engage with client service providers/consultants</b>	<b>BEXs has to consult and engage with client service providers/consultants</b>
R3,500	Quotation provided based on scope of work

## Our Story

Established in 2017 by seasoned Fiduciary practitioners who operated in the corporate environment for a combined 100 years plus. We grew uneasy with the corporate operating model which appears to “place profit before client”. The rigidity of the corporate offering, and the pedestrian manner in reacting to the client’s ever changing fiduciary needs precipitated the formation of BEXs. Our focus on flexible, cost effective, client centric fiduciary solutions drive our story.

**BEXs - Bespoke Executor Services (Pty) Ltd**  
**Registration Number 2017/323054/07**

**Head office physical address:**

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