



**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

## **Overarching pricing policy**

All our fees are negotiable and mutually agreed upon.

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

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

## **Our services**

<b>Estate Administration</b>	<b>Trust Administration</b>
<b>Estate Planning</b>	<b>Trust Deed Drafting</b>
<b>Will Drafting</b>	<b>Will Storage</b>
<b>Settlement Trust Administration</b>	<b>Fiduciary Dispute Resolution</b>
<b>Independent Trusteeship</b>	<b>Estate Liquidity Analysis</b>
<b>Trust Secretarial Services</b>	



## Where we operate

<b>Western Cape</b>	<b>Kwazulu Natal</b>
<b>Free State &amp; Northern Cape</b>	<b>Gauteng</b>

## Estate Planning and Liquidity Check

### Comprehensive Estate Planning Analysis

BEXs undertakes a comprehensive 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.

### Liquidity Check

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>Comprehensive Estate Planning including a written analysis</b>	<b>Liquidity Check including a written analysis</b>
R2,500	R1,250



## Estate Administration Services

### Estate Administration

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>
Where BEXs is the nominated Executor - 2,65%	6%

## Trust Administration Services

### Trust Deed Drafting

<b>Where BEXs is appointed as one of the trustees</b>	<b>Where BEXs is not appointed as a trustee</b>
R6,000	R7,500



## Registration of Trust Deed

If BEXs is required to register the Trust Deed with the Master of the High Court, on behalf of the parties to the trust

Where BEXs is appointed as one of the trustees	Where BEXs is not appointed as a trustee	Sundry charges (Master certified copies, courier fees etc)
R500	R1,000	R1,000

## Trust auditing/reviewing and amendments

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

Trust legality auditing & reviewing fee	Trust Deed Amendments
R3,000	R3,000

## 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 fee	Ongoing annual Administration fee*	Termination fee	Tax Registration and set up fee
R2,000	Between 0,80% and 1%	R3,000	R1,000

\* Based on gross capital assets under administration (subject to a minimum fee of R12,500 p/a), recovered monthly in arrears.

## 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

## Will Drafting, Storage Services and Living Wills

This service is free for **BEXs clients**.

## Independent Trustee Services

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 us [admin@bexs.co.za](mailto:admin@bexs.co.za) for a quotation.



## Fiduciary Dispute Resolution

Having a dispute with an Executor or Trustee?

BEXs can assist you with these disputes.

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

## Our Story

Established in 2017 by seasoned Fiduciary practitioners who operated in the corporate environment for a combined 100 years plus. The founders 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 drives our story.

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

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