



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

BEXs fees are negotiable and mutually agreed upon.

Value added tax (VAT)

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

Where we operate

Gauteng	Kwazulu Natal
Western Cape	

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



A	Liquidity Analysis	R1,250
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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	Detailed Estate Planning	R3,500
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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.

C	Deceased Estate Administration Services
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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.

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

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



D	Trust Administration Services
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Trust Deed Drafting

Where BEXs is appointed as a trustee	Where BEXs is not appointed as a trustee
R6,500	R8,500

Trust Deed Registration

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, stamp duty, courier fees etc)
R2,000	R2,500	R1,000



Trust legality auditing/reviewing and amendments

Reviewing and auditing of trust deeds and 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 administration fee	Tax Registration and set up fee
R2,500	Between 0,80% and 1%*	R3,500	R1,500

* 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

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.

F	Independent Trustee Services
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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 us for a quotation.

G	Fiduciary Dispute Resolution
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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 us for a quotation, as we will need to analyse the dispute and consider the work involved before quoting.



H	Deceased Estate Firearm Administration Services
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Firearms Control Act Compliance Pricing		
Service	Standard Fee	Additional Firearms for the same estate
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 – Application excluding the SAPS 271	R1,200	
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



- The sale of firearms out of an estate is an agreement between buyer and seller and BEXs will only introduce the parties
- Prices DO NOT INCLUDE courier fees for the transport of firearms between stakeholders
- BEXs utilises the services of RAM couriers for the safe transport of firearms. As above these costs are additional to BEXs costs
 - If BEXs collects the firearm, a travel fee of R5,00 per kilometre will be an additional fee
- In all instances BEXs will issue a quotation for the client to either accept or reject

FIREARM SEARCH FEE

FEE PAYABLE FOR SEARCH TO ESTABLISH IF DECEASED OWNED FIREARMS

R100 per estate

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

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