



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

Estate Administration	Trust Administration
Estate Planning	Trust Deed Drafting
Will Drafting	Will Storage
Settlement Trust Administration	Fiduciary Dispute Resolution
Independent Trusteeship	Estate Liquidity Analysis



Where we operate

Western Cape	Kwazulu Natal
Free State & Northern Cape	Gauteng

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.

Comprehensive Estate Planning (incl. Analysis)	Liquidity Check (incl. Analysis)
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.

Executors fee (based on market value* of capital assets as at death)	Income collection fee
Between 2,65% and 3,50% Based on the nature of assets and envisaged administration process.*	6%

* BEXs will have the estate's assets valued as stipulated by the Master, and will use a valuation that is most favourable to the estate. For example, in the case of fixed property and, if the regulations permit, BEXs will use the lowest of an estate agent or municipal valuation.



Trust Administration Services

Trust Deed Drafting

Where BEXs is appointed as one of the trustees	Where BEXs is not appointed as a trustee
R6,500	R8,500

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 (Mater certified Copies, courier fees etc)
R2,500	R3,500	R1,000



Trust 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
R4,250	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
R2,500	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.



Will Drafting & Storage Services

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.

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 for a quotation.



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Fiduciary Dispute Resolution

Having a dispute with an Executor or Trustee? BEXs can assist our clients and our 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.

Our Story

Having operated as Fiduciary Practitioners in the corporate environment collectively, for 100 years plus, we grew tired of the corporate operating model of “placing profit before client”!

The rigidity of the operating model, coupled with the pedestrian manner in reacting to the clients ever changing fiduciary needs, we decided to form BEXs, offering client centric, personalised fiduciary solutions, directly to the client or by partnering with our trusted financial planning partners.

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

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