

SERVO FIDUCIARY SERVICES (PTY) LTD

FEE SCHEDULE

WILLS	FEE
Drafting of will without consultation (where Servo is nominated as Executor)	550
Drafting of will without consultation (outside party nominated as Executor)	1 250
Drafting of a complex will together with consultation	1 250
Revision of your existing will (first two revisions are free of charge - thereafter)	250
Safekeeping of will (where Servo is nominated as Executor)	No charge
ESTATE ADMINISTRATION	FEE
Maximum allowable fees in terms of the Administration of Estates Act	3,50%
We offer competitive discounted rates on the statutory Executor's fee	
<u>Additional benefits</u>	
Nedbank Corporate Saver accounts with money market interest rates from the first Rand	
Monthly fees of R 11.50 and transaction fees of R 4.50 per transaction	
All bank accounts are opened and managed in our offices	
We visit the Master's office twice a week and have a post box at their offices	
Specialised services in respect of the deceased's and estate's taxes	
Above average turnaround time on administration of estates	
TRUST SERVICES	FEE
Drafting of trust deed and registration with Master of the High Court	4 500
Substitute trust deed and registration with the Master of the High Court	3 500
Auditing of an existing trust deed	1 250
Resolutions, minutes of meetings, change of trustees	1 250/hour per hour
Appointment as independent professional trustee	On quotation basis
Trust administration for inter vivos and testamentary trusts	On quotation basis
ESTATE PLANNING	FEE
Liquidity calculation and will	2 500
Simple estate plan	3 500
Comprehensive estate plan with a trust audit	+/- 5 700
Fees are negotiated before work commences and depends on complexity and client needs	
Factors that may influence the time spent on an estate plan:	
Financial Statements of trusts and/or businesses	
Buy and Sell Agreements	
Consultation with the client's auditors	

ANCILLARY SERVICES

FEE

Drafting of buy and sell agreements	1 900
Ad hoc consultation	1 250 per hour
Business structuring, coaching & consulting	On quotation basis

Fees are negotiated before work commences and depends on complexity and client needs

Factors that may influence the time spent on an estate plan:

Financial Statements of trusts and/or businesses

Buy and Sell Agreements

Consultation with the client's auditors

VALUE TO THE INTERMEDIARY

We ring-fence your client and therefore act as an extension of the intermediary's business

Identify further opportunities and offerings

Referral fee of 35% on the estate administration fees after the first R10,000 has been taken.

In an estate with a fee of R 100,000 - R31,500 will be paid back to the intermediary.

Our approach is solution based and we therefore look at building relationships

White labeling available on request

CONTACT DETAILS

Brenton Ellis

Founding Director

brenton@servofs.co.za

082 331 2354

Tanya Lochner

Fiduciary Specialist

tanya@servofs.co.za

082 457 3573

Tel: (021) 492 5094

Fax: 086 240 0739

Email: info@servofs.co.za

Address: 5th Floor, Cento East Building, Bella Rosa Office Park, Cnr of Durban and
Bella Rosa Roads, Bellville