



**LEGATUS** trust

PROTECTING AND INCREASING YOUR WEALTH



## Who Are We?

Legatus Trust was established in 1992 and was born out of the need in the marketplace for an independent company to render fiduciary services to clients in all segments of the market.

“Legatus” is Latin for legacy or inheritance and defines the core business of Legatus Trust. We strive to protect and grow the assets and wealth of our clients during their lifetime and, in the unfortunate event of death, we will continue to protect and grow the inheritance of our client’s loved ones thereby ensuring the wealth and legacy of the next generation.

Legatus Trust is a fully licensed, independent trust company dedicated to providing you with a full array of fiduciary services. Whether it is a will you need, your estate to be planned, a deceased estate to be administered or a trust to be formed and/or managed, we can help you. Apart from rendering these services, we can also assist and advise you and your clients on any of these matters.

We will give you the individual attention, customised advice and service that you and ultimately your clients will greatly benefit from.

As a member of the Fiduciary Institute of Southern Africa (FISA), Legatus Trust subscribes to the institute’s high standards of competence, integrity and honesty. FISA has over 700 individual members, who collectively manage in excess of R250 billion. Membership is drawn from trust companies and banks, as well as legal, accounting and financial planning professionals.

Today Legatus Trust is a well-respected authority on the drafting of wills and rendering of fiduciary services throughout South Africa. Many brokers are registered intermediaries with Legatus Trust, using our expertise, advice and services which offer complete peace of mind to their clients.

**Protecting and increasing your wealth**

## What Do We Do?

### Will Services

- Planning of wills.
- Drafting of wills.
- Safe custody of signed wills.
- General information and advice relating to wills.

### Deceased Estate Services

- Administration of deceased estates as nominated executor/co-executor or agent for nominated executor.
- General information and advice to beneficiaries and creditors regarding their interests in deceased estates.

### Trust Services

- Management of trusts created by a will as nominated trustee, co-trustee or agent for the trustee.
- Planning, creating, registering and management of trusts in respect of pension funds, retirement funds and/or group life assurance lump sum benefits payable upon death of the member in trust for the benefit of his dependents.
- General information and advice relating to testamentary trusts



## Why Choose Legatus?

We will provide you and your clients with individual attention, which is incredibly scarce in today's market place. We also have the advantage of staff members who have great knowledge and experience of the duties and obligations of executors and trustees.

We believe that the services Legatus Trust can offer you and your clients will add a unique feature to the products already on offer by you.

Legatus Trust currently has offices in:

Randburg  
Pretoria  
Bellville

## What Is In It For You?

Quick turnaround time for wills – within 24 hours.

Safe custody of signed wills.

Advice for current and future clients on fiduciary services which will add great value to your products.

Personal service.

Client retention due to extra value added.

You can negotiate commission and/or discounts on:

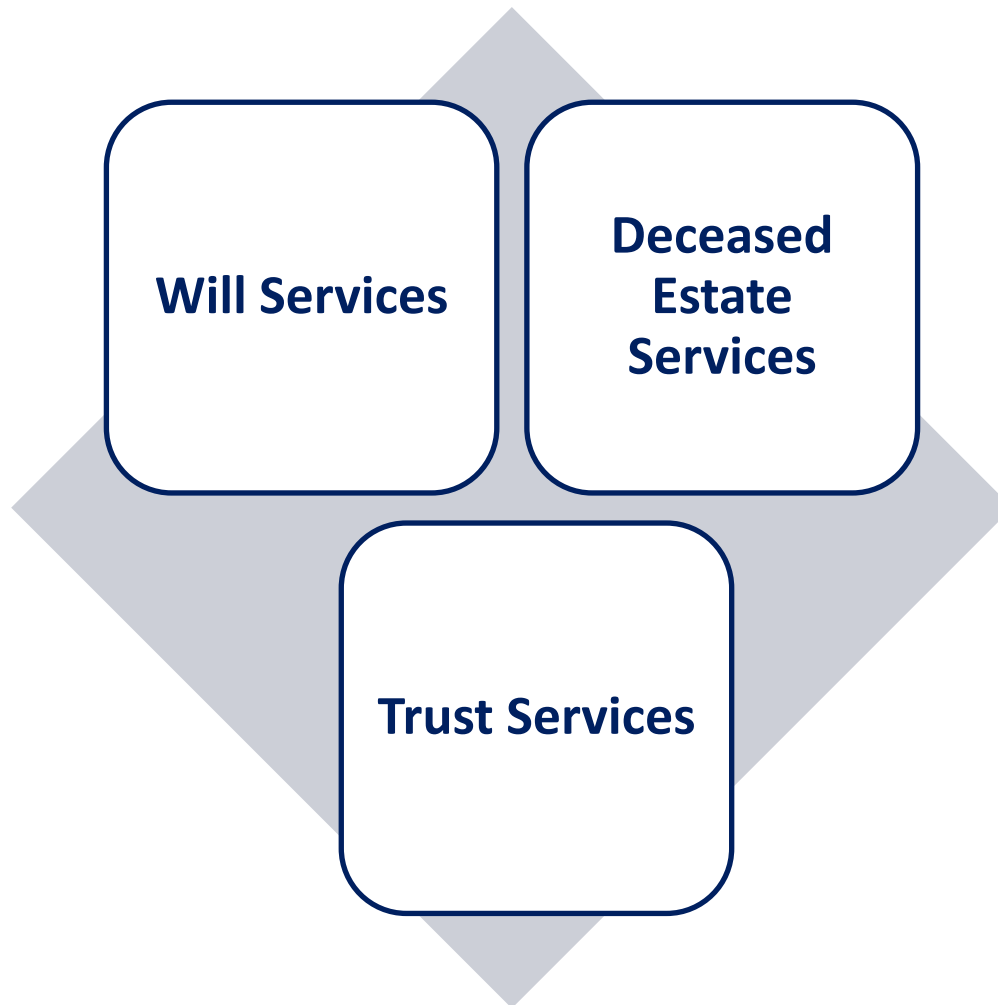
- New wills;
- Executor's fees; and
- New trusts (testamentary).

Investments of trust capital to be referred to you on trusts established for any of your clients - testamentary trusts. This presents an additional way for you to retain the business of a client, even in the unfortunate event of the death of a client.

Opportunity to add more products to your offering, such as a product to cover the estate administration expenditure, which can attract more business to you.



# Services and Products





# Will Services



**Planning of wills**

**Drafting of wills**

**Applications via e-mail**

**Safe custody of signed wills**

**General information and advice relating to wills**

**Online application and processing**



# Deceased Estate Services



**Administration of deceased estates**

**Executor/co-executor services**

**Administration of deceased estates as agent for the executor**

**General information and advice to beneficiaries and creditors regarding their interests**



# Trust Services



**Management of testamentary trusts as nominated trustee, co-trustee or agent for the trustee**

**General information and advice relating to testamentary trusts:**

- The benefit of minor heirs. The trust will own the assets until the beneficiaries attain a certain age
- To protect any inheritance payable to persons that suffer from serious physical disabilities, where such disabilities incapacitate such persons from earning sufficient income for themselves
- To protect the inheritance of the capital beneficiaries in cases where the income beneficiaries and capital beneficiaries are not the same

**Acting as agent under special power of attorney for persons incapable of managing their own affairs due to old age and/or medical conditions**

**Management in trust of pension fund, retirement fund and/or group life assurance lump sum benefits payable upon death of the member for the benefit of his dependents**



# Legatus Trust Contact Details



## Operational Offices

### Gauteng Head Office

Roan House, 3<sup>rd</sup> Floor  
263 Kent Avenue  
FERNDALE, RANDBURG  
2194

#### **Dawie Roux (Johannesburg)**

Cell no.: 082 828 5261  
Tel no.: 0861 722 626  
E-mail: dawie.roux@legatus.co.za

P O Box 17  
PINEGOWRIE  
2123

#### **Nico van der Merwe (PTA)**

Cell no.: 064 792 6025  
Tel no.: 0861 722 626  
E-mail: nico.vandermerwe@legatus.co.za

Tel no.: 0861 722 626  
Fax no.: 0861 115 704  
E-mail: info@legatus.co.za  
www.legatus.co.za

### Cape Town Office

Imperial Terraces, 3<sup>rd</sup> Floor  
Carl Cronje Drive  
TYGER WATERFRONT, BELLVILLE  
7530

#### **Marie Eksteen (Cape Town)**

Cell no.: 082 445 9549  
Tel no.: 021 914 4924/5  
E-mail: marie.eksteen@legatus.co.za

P O Box 3883  
TYGER VALLEY  
7536

Tel no.: 021 914 4924/5  
Fax no.: 021 914 1069