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**AITKEN LAMBERT
ELSWORTH**

CHARTERED ACCOUNTANTS (S.A.)



WILLS & ESTATE PLANNING

Entrust your financial wellbeing and that of
your family to people you can count on



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WHY IS IT IMPORTANT TO HAVE A WILL?

- To ensure that the financial welfare of your family is taken care of according to your wishes.
- To provide protection for your dependants (heirs).
- A Will also allows you to appoint a legal guardian for your minor children.
- Dying “intestate” (i.e. without a Will) often delays the winding up process and can cause unnecessary stress for dependants.
- It does not matter how much money you earn, where you live, if you are married with children or are single, whether you own any major assets or not you should still have a Will.

SHOULD I HAVE MY CURRENT WILL UPDATED?

It is important to have your Will reviewed and updated as and when your personal circumstances change.

APPOINTMENT OF EXECUTOR

It is important to appoint an executor who has experience in dealing with Wills and Estates, with the skills required to handle the estate process efficiently and effectively. Our directors are available to discuss your personal needs and our firm has over 30 years of Wills and Estates experience. Our firm takes a personal approach when dealing with this sensitive topic. We ensure that your immediate family is kept informed during the stages of winding up the Estate, so that they will not be left feeling vulnerable and financially insecure. We can provide secure storage of your Will and we ensure that your affairs are kept confidential.

WHAT DOES IT COST TO PREPARE A WILL?

There are no preparation costs.
There is no cost for updating your Will.

WHERE SHOULD YOU KEEP A WILL?

The original Will should be kept in a safe place and your immediate family must know where to find it.

WHAT IS ESTATE PLANNING?

An ‘estate’ comprises the assets and liabilities that a person accumulates during their lifetime, and which they leave behind at death.

‘Estate planning’ has been defined as the process of creating and managing a programme that is designed to:

- Preserve, increase and protect a person’s assets during their lifetime;
- Ensure the most effective and beneficial distribution thereof to the succeeding generation on death, in accordance with your wishes.

AIMS OF ESTATE PLANNING

The main aim for any person, working together with their estate planning team, is to ensure that as much of their accumulated wealth is utilised for their own benefit and for his/her dependants on their death. Some of the goals of estate planning include:

- To achieve efficient deceased estate administration.
- To appoint heirs or legatees of choice and distribute assets in accordance with a person’s wishes.
- To provide for dependants and protect minor beneficiaries.
- To minimise the impact of taxation on an estate.
- To provide for future growth of assets outside of a person’s estate.
- To provide for business interests (where applicable).
- To provide for a person’s unique circumstances.
- To take account of offshore assets (where applicable).
- To decide whether to execute a living Will.



BACKGROUND

The firm was founded in 1988. Currently it has approximately 40 staff members.

The practice has established itself as a significant firm of Chartered Accountants in KwaZulu Natal, servicing small to medium sized businesses and individuals.

We are a member of MSI – an international legal and accounting association with representation in over 100 countries.

OUR MISSION STATEMENT

We strive to be the accounting, auditing and business consultants of first choice to small and medium-sized entities and the motivated individuals who drive them.

Through the efforts of our highly skilled staff, we offer affordable, value-adding services that are focused on the needs of our clients.

The result of our work is the creation of wealth for our clients, our community and ourselves.