

FPI Estate Planning & Trust 2023

Date: 19 April 2023

Duration: 08:50 – 12:20

CPD: 3 Verifiable Technical CPD hours

Time	Topic	Speaker
08:50	Welcome	
09:00	Pitfalls and important points when using trusts as part of estate plans. <ul style="list-style-type: none"> • Understanding the rights of different types of beneficiaries under trust arrangements • How trusts can and should be used in conjunction with different legal entities • The consequences of divorce on trusts used in estate planning • The importance of proper governance in trusts 	Louis van Vuren, CFP®
10:00	Tea Break	
10:10	Legal developments and implications in estate planning <ul style="list-style-type: none"> • Unjustifiable discrimination in private wills. • Notions of property in customary law and how the complex legal framework regulating marriage may pose difficulties in estate planning • Amendment to the Recognition of Customary Marriages Act 	Prof. Fatima Osman
11:10	Comfort Break	
11:20	Panel discussion on Practical Pitfalls in Estate Planning	Panel Discussion Moderator: Nici MacDonald, CFP® Renate Jute, CFP® David Thomson, CFP®