March 2023

The Financial Planning Institute of Southern Africa 2023 Estate and Trust Planning Workshop puts out an impressive lineup of topics and subject matter experts

Johannesburg: Legal developments and implications for estate planning and recent developments in Trusts will be the focus of the Financial Planning Institute of Southern Africa's (FPI) half-day online Estate and Trust Planning Workshop, to be held on 19 April, from 09H00 - 12h20.

With an impressive lineup of subject matter experts, the workshop will also feature a panel discussion on *Practical Pitfalls in Estate Planning*, to be moderated by Nici Macdonald, CFP®, the FPI's Head of Department for Certification and Standards.

In addition to the edifying relevant content, FPI members also stand to gain three verifiable Technical Continuous Professional Development hours by attending.

The full list of topics, and presenters, includes:

- Legal developments and implications for estate planning: **Prof. Fatima Osman**
- Recent developments in Trusts - linking Court Cases applying to a financial planning perspective: **Louis van Vuren, CFP® FPSA®**
- (Panel discussion on) Practical Pitfalls in Estate Planning:
    - **David Thomson, CFP® FPSA®** (panel member)
    - **Renate Jute, CFP® FPSA®** (panel member)
    - **Nici Macdonald, CFP®** (moderator)

The full speaker list:

Prof. Fatima Osman

Fatima Osman, an admitted attorney of the High Court, is an Associate Professor in Private Law at the University of Cape Town, where she lectures the Law of Succession and African Customary Law. Her research and teaching interests are in the areas of customary law as well as succession and legal pluralism. She holds a B Bus Sci, LLB and LLM PhD from the University of Cape Town.

Louis van Vuren, CFP® FPSA®

Louis van Vuren, CFP® FPSA®, is the CEO of the Fiduciary Institute of Southern Africa. He has more than 30 years in financial services, with 24 of these in the fiduciary industry. He served as a legal adviser, and in various senior management roles, at Old Mutual, Old Mutual Trust and BoE Trust. Louis is also a director of Trust Services at Finlac Risk and Legal Management (Pty) Ltd. He holds BA, LLB and LLM degrees from the University of Johannesburg, the Advanced Certificate in Leadership from the University of Cape Town and the Advanced Post-Graduate Diploma in Financial Planning from the University of the Free State.

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David Thomson, CFP® FPSA®

David Thomson, CFP® FPSA®, is a Senior Legal Adviser at Sanlam Trust: Fiduciary Services. He specialises in litigation management, Trusts, Wills, Deceased Estates, Privacy Law, Risk Management and Life Insurance. He has served independent financial planners and selected intermediaries in the banking industry for 15 years. David is also a former member of the FPI board.

Renate Jute, CFP® FPSA®

Renate Jute, CFP® FPSA®, has been in the Financial Services, Trust Accounting and Administration industry since 2001. In 2011 she became more involved in Financial Planning and Deceased Estates, and from 2015 became interested in Personal Development and started to focus more on coaching and mentoring. He strengths are in her ability to see patterns in numbers and data.

Nici Macdonald, CFP®

Nici Macdonald, CFP®, is the Head of Department for Certification the FPI. She has a strong legal background and is passionate about the future of financial planning and financial advice in South Africa. She has extensive experience in practice management within a financial services provider, specifically, the operational support needed and procedures underpinning the financial planning advice process. Nici's professional experience includes acting in the capacities of wealth advisor and fiduciary advisor for many years before taking up the position at the FPI. Academically, she was involved with the University of the Free State (UFS) in drafting material, setting examinations, and lecturing for the Advanced Diploma in Estate and Trust Administration. Nici holds an LL.M (Private Law) and an Advanced Postgraduate Diploma in Financial Planning from the UFS. She also holds the CFP® professional designation as well as the FPSA® designation from the Fiduciary Institute of Southern Africa.

The attendance fees for the event are as follows:

FPI - designated members - (CFP®, RFP™, FSA™)

R 450.00 (inclusive of vat) per individual

FPI - non-members

R 550.00 (inclusive of vat) per individual

Bulk Bookings

R 450.00 (inclusive of vat) per individual - Bulk booking requires 10 booked at once.

By the Financial Planning Institute of Southern Africa