

Estate and Trust Masterclass

Agenda

TIME	TOPIC	SPEAKER
08h30 – 08h35	Welcome and opening.	Henda Kleingeld, CFP®
08h35 – 09h35	Beneficiary Nominations vs the Will: Where Planning Commonly Breaks Down.	
09h35 – 09h45	COMFORT BREAK	
09h45 – 10h45	Minor Beneficiaries, Trust Structures & Guardianship Realities.	Renate Jute, CFP®
10h45 – 10h55	COMFORT BREAK	
10h55 – 11h45	Fiduciary reforms, implementation realities and recent case law under section 37C of the Pension Funds Act	Jannie du Plessis
11h45 – 12h15	Bringing It All Together: Adviser Responsibilities, Risk & Best Practice.	Sarah Jane Love, CFP®
12h15 – 12h20	Closing.	



Building Better Futures