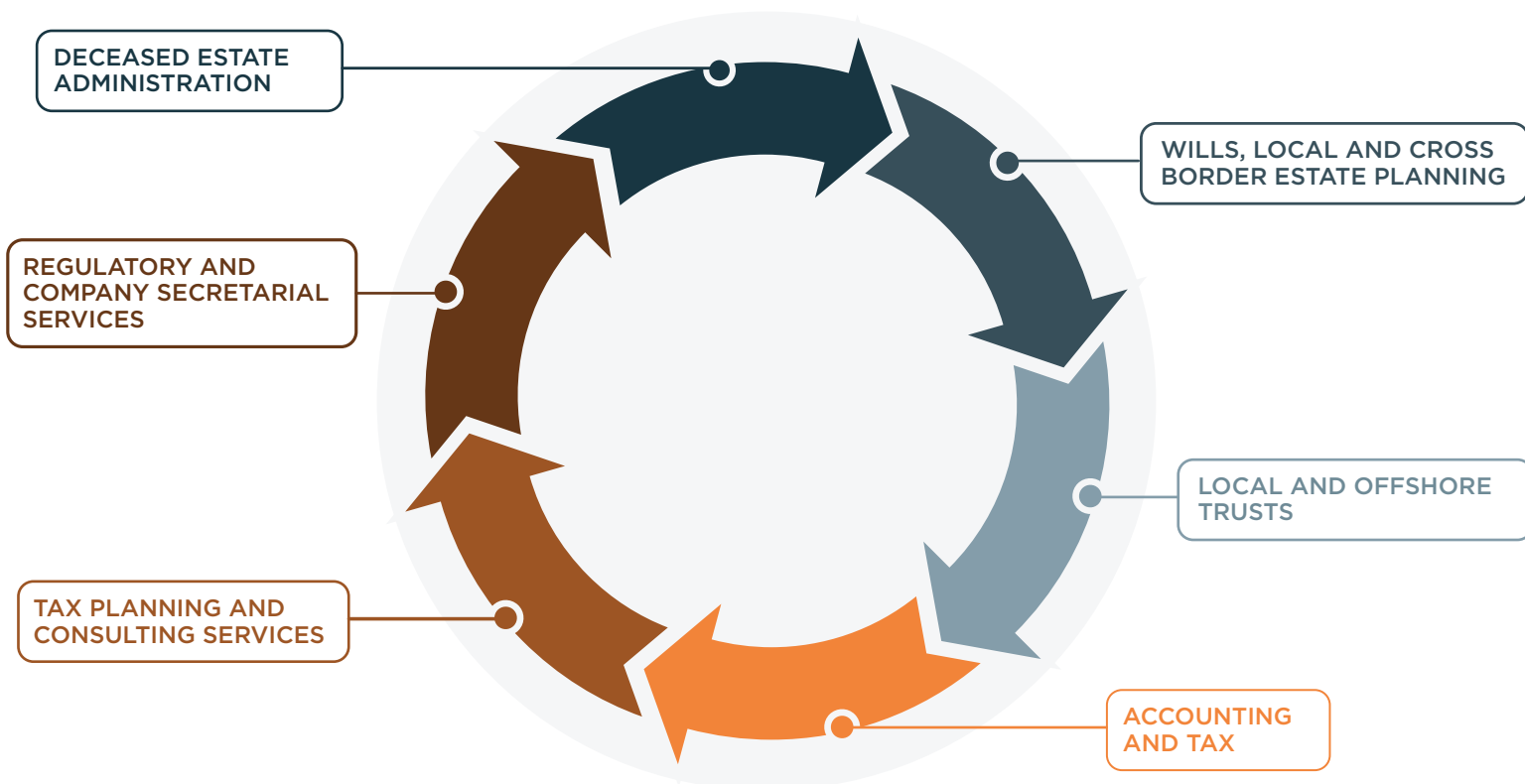


# Making the complex simple

Sentinel is an independent fiduciary service company with a lifelong heritage of keeping client relationships at the heart of everything we do. Our focus is to ensure that wealth is preserved for future generations and that succession planning and tax mitigation strategies are implemented correctly.



## WILLS, LOCAL AND CROSS BORDER ESTATE PLANNING

- Cross-Border Balance Sheet Planning
- Local and Offshore Wills
- Multi-jurisdictional estate planning
- Advice for Cross-Border Beneficiaries
- Situs Tax and Probate in offshore jurisdictions

## LOCAL AND OFFSHORE TRUSTS

- Independent Trusteeship
- Trust Administration
- Protector Services
- Corporate Directorships
- Family Constitutions
- Philanthropy

## ACCOUNTING AND TAX

- Corporate Accounting and Tax Compliance
- Trust Accounting and Tax Compliance
- Trust third party reporting (IT3T & IT3D)
- Individual Tax Compliance
- Post Emigration Tax Compliance
- Deceased Estate Tax Compliance (pre and post date of death)
- Provisional Tax Compliance

## TAX PLANNING AND CONSULTING SERVICES

- Multi-jurisdictional estate planning
- Advice for Cross Border Trust Beneficiaries
- Special Trusts and Disability Expenses
- Income Tax Treaty Queries
- International Tax Residency Opinions
- General Tax Opinions
- SARS Dispute Resolution
- SARS Tax Emigrations and Immigrations
- SARS Voluntary Disclosure Programme Applications

## REGULATORY AND COMPANY SECRETARIAL SERVICES

- Company Registration and Annual Compliance
- Creating and maintenance of Beneficial Ownership Registers and upload onto the Master's Portal.
- Full Company Secretarial Solution.
- Safe Keeping of Company Secretarial Records.

## DECEASED ESTATE ADMINISTRATION

- Initial meeting with family to gather information and explain estate process
- Reporting the estate to the Master of The High Court
- Obtain Letters of Executorship
- Assessing assets and liabilities
- Preparing the Liquidation and Distribution Account
- Settling debts and liabilities, incl income tax and estate duty
- Distribution of Assets

## CONTACTS

Should you require any information regarding our services or wish to arrange presentations / interviews or panel discussions, please contact [Rickyo@sentineltrust.co.za](mailto:Rickyo@sentineltrust.co.za)

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