

PRACTICE NOTE FOR SELF SERVICE IN LINE WITH CHIEF MASTER DIRECTIVE 2 OF 2015

1. Role players ensure Jurisdiction is with the Master Johannesburg in terms of section 4 of the Act and or waiver of jurisdiction has been applied and granted in between the offices concerned.
2. Where the deceased left a will or codicil, the will must be considered by the Master before matter is captured
3. Role must ensure that the following forms and documents are of file and in sequence as listed below:
 - 3.1 - Death notice (J294)
 - 3.2 - Death certificate,
 - 3.3 - Marriage certificate, Civil Union certificate, Customary Marriage certificate,
 - 3.4 - Police report in respect of unnatural death
 - 3.5 - Divorce order and Settlement
 - 3.6 - Will, Codicil or any document purporting to be a will,
 - 3.7 - Customary adoption MBU 17
 - 3.8 - Next of kin affidavit duly commissioned where the deceased left no will indicating the heirs or left a will indicating a class of heirs who are not identifiable (J192)
 - 3.9 - Declaration Mbu 5 confirming that the estate has not been reported to any Master or Service Point
 - 3.10 - Inventory in terms of section 9 of the Act reflecting the assets of the joint/massed (J243)
 - 3.11 - A list of debts and or creditor in the estate
 - 3.12 - Acceptance of trust as executor (J190) where the value estate is above 250 00 / undertaking and acceptance of Master direction (J155) where the value of the estate is less than 250 000 estate with value of to determine the type of appointment to be issued
 - 3.13 - Where the estate is to administer in terms of section 18 (3) of the Act, the inventory should reflect all immovable, movable and claims in favor of the estate
 - 3.14 - Nominations in writing from major heirs and or interested parties where the deceased died intestate or no administrator has been nominated in a will or is incapacitated or refuses to act or untraceable

- 3.15 - Security in terms of section 23 of the Act (in estates with the value of more than 250 000) in respect of every person not nominated by will, resides outside South Africa , insolvent or committed and act of insolvency, any other reason
- 3.16 - Persons who are within the third degree of relationship to the deceased or exempted in a will or by court are exempt from furnishing of security

HOUSE KEEPING RULES

- 4. Matters must be scanned before matters are referred to AM for approval
- 5. Role players will have Two Hours (2) slots to access the service
- 6. Access will be allowed to role players from 7: h 45 am – 15: h 00 pm daily
- 7. The service will be on first come first serve basis
- 8. Clients must ensure files prepared and scanned in terms of examiners code and in order of (Barcode, death notice with all home affairs documents, affidavits, inventory with all supporting vouchers, undertaking and acceptances, and lastly correspondence in dated order
- 9. Files can only be handled/moved by Assistant Master in charged once captured

REQUIREMENTS FOR ENROLMENT FOR SELF SERVICE:

- 10. Role players must at least be a qualified attorney or accountant and or qualified estate administrator
- 11. Role players must be affiliated with a governing body including Law Society, SAIPA, SAICA, FISA etc
- 12. Role players must lodge at least a Fidelity Fund certificate
- 13. Role players must lodge a full profile of their practices with the Master
- 14. Role players will at all times be supervised by Assistant Master in charge
- 14. Matters can only be captured after been checked and documents date stamped by the Assistant Master in charge