Sanlam PRIVATE Wealth

FIDUCIARY AND TAX SERVICES

Your wealth is more than numbers – it reflects your future and your legacy. Protecting and growing it begins with choosing the right structure to house and protect your assets. At Sanlam Private Wealth, cross-disciplinary teams advise on, set up and manage your investment structures for you – including local and offshore trusts and companies.

But structure is only the foundation. As part of an integrated strategy, we expertly blend asset classes to manage risk and pursue growth, aligned with how you live, invest and plan for the future. Our fiduciary and tax specialists – together with your portfolio manager – provide expert advice on global estate planning and multi-jurisdictional tax administration.

The right support ensures every decision is tailored to your needs and circumstances. You'll have access to a full range of fiduciary and tax services – whether you invest as an individual, or through a trust or a company.

INVESTMENT STRUCTURING AND TAX ADVICE – LOCAL AND OFFSHORE

Our team stays up to date with the constantly evolving global tax landscape – so you don't have to.
We advise across jurisdictions on:

Tax planning for individuals and trusts

- Individual and trust taxes
- Cessation of tax residency, emigration and foreign earnings
- Navigating double taxation agreements
- Planning for life transitions: marriage, divorce, children and grandchildren
- Tax exposure for US passport / green card holders or US-based children.

Cross-border and regulatory advisory

- Situs and cross-border tax considerations
- Regulatory matters with the SA Reserve Bank
- Complex structures and asset restructuring.

Trust and company administration

- Local company and trust formation
- Creation of BEE, charitable, special and Shariah trusts
- Offshore company resident directorships and secretarial services
- Local and offshore corporate trustee services
- Trust administration, accounting and deed reviews.

GLOBAL ESTATE PLANNING

We support the smooth transfer of your assets across generations and borders, with services that include:

- Succession and intergenerational wealth transfer
- Local and international inheritance taxes
- Drafting and reviewing local and offshore wills
- Safe custody of title deeds, trust documents and share certificates
- Executorship services
- Offshore estate administration.

TAX AND ACCOUNTING SERVICES

Our tax compliance team provides a seamless, all-inclusive service. We handle tax and accounting for individuals, trusts and deceased estates, including:

- Personal income tax:
  - Registration
  - Annual and provisional submissions
  - Queries, objections, tax clearance
  - Cessation of tax residency
- Trust and estate tax compliance.

A TEAM YOU CAN TRUST

Our fiduciary and tax team combines deep technical expertise with a long-standing record of excellence. Based across regions, we're committed to helping you structure your wealth to serve your life – and your legacy.