CURRICULUM VITAE

Summary

Solid background and understanding of Wills, Trusts with 15 years' experience (professional and academic) in estate administration, mentoring and payment authorization to the institution and heirs. Capable of working independently and/or in a team, multitask and work under pressure. Keen to learn and acquire new skills and adjust well to different environments. Possess strong interpersonal and technical skills; good networking skills; good negotiating skills; good report writing skills and analytical skills.

DETAILED EMPLOYMENT HISTORY

Company:	Standard Executors and Trustees
Period:	09 December 2019 to date
Position:	Estate Officer

Responsibilities:

- Consulting with clients to gather the necessary information for reporting estates
- Completing the Inventory and Death Notice and obtaining of the relevant documents to report the estate
- Reporting the estate to the relevant institution, e.g. SARS, Master of the High Court, Banks, Insurance Companies, etc
- Advertise the said estate in terms of Section 29 of the Estate Act, inviting all the debtors and creditors of the deceased person
- Collecting of funds due to the estate
- Keeping heirs up to date with regard to the progress of the estate on a monthly basis
- Drafting of the Liquidation and Distribution Account and lodging same with the relevant institutions
- Liaising with the clients regularly to ensure that the clients' expectations and needs are met.
- Drafting the cash statements and cash reconciliation for submission to clients

Company:	**Nedgroup Trust**
Period:	01 June 2013 to date
Position:	Business Development Consultant

Responsibilities:

- Supporting the Nedbank Retail bank and Old Mutual PFA network in the gaining and processing of New Paid or Revision of Wills and the intake of Testamentary & Agency Estates and to sell directly to the clients of Nedbank and Old Mutual PFA.

- Drive a set target New and Revised Wills within the branches of Nedbank Retail Bank and Old Mutual PFA
- Drive the quality inflow of the New Paid and Revised Wills through the sub-segments
- Review all Will Applications received via other channel thoroughly i.e. the application form has been completed in full
- Drive Fiduciary Products & Services (Wills, Estates & Trusts) via alternate platforms in Nedbank Retail bank; Old Mutual PFA as well as Independent Brokers
- Training all the Nedbank Retail bank and Old Mutual PFA delivery channels regarding safe keeping of Wills
- Check that all signed Wills lodged for Safe Custody meet with the Legal requirements of the Wills Act
- Achieve set targets on agency or dative estates
- Report Agency Estates to the Deceased Estate Department within Nedbank Trust
- Give professional and a high standard of service to all clients both internally and externally
- Resolve customer complaints and ensure customer satisfaction
- Sourcing of new service provider i.e. Independent Financial advisors

Company:	Standard Executors and Trustees
Period:	01 July 2011 to 31 May 2013
Position:	Estate Administrator

Responsibilities:
- Consulting with clients to gather the necessary information for reporting estates
- Completing the Inventory and Death Notice and obtaining of the relevant documents to report the estate
- Reporting the estate to the relevant institution, e.g. SARS, Master of the High Court, Banks, Insurance Companies, etc
- Advertise the said estate in terms of Section 29 of the Estate Act, inviting all the debtors and creditors of the deceased person
- Collecting of funds due to the estate
- Keeping heirs up to date with regard to the progress of the estate on a monthly basis
- Drafting of the Liquidation and Distribution Account and lodging same with the relevant institutions
- Liaising with the clients regularly to ensure that the clients' expectations and needs are met.
- Drafting the cash statements and cash reconciliation for submission to clients

Company:	**FNB Trust Services**
Period:	01 January 2006 to 30 June 2011
Position:	Estate Administrator

Responsibilities:
- Consulting with clients to gather the necessary information for reporting estates
- Completing the Inventory and Death Notice and obtaining of the relevant documents to report the estate

- Reporting the estate to the relevant institution, e.g. SARS, Master of the High Court, Banks, Insurance Companies, etc
- Advertise the said estate in terms of Section 29 of the Estate Act, inviting all the debtors and creditors of the deceased person
- Collecting of funds due to the estate
- Keeping heirs up to date with regard to the progress of the estate on a monthly basis
- Drafting of the Liquidation and Distribution Account and lodging same with the relevant institutions
- Liaising with the clients regularly to ensure that the clients' expectations and needs are met.
- Drafting the cash statements and cash reconciliation for submission to clients

Company:	**Absa Trust (Kempton Park)**
Period:	September 2003 – December 2005
Position:	Assistant Estate Admnninistrator

Responsibilities:

- Reporting of an estate i.e. consulting with the family of the deceased
- Completing the Inventory and Death Notice and obtaining of the relevant documents to report the estate
- Reporting the estate to the relevant institution, e.g. SARS, Master of the High Court, Banks, Insurance Companies, etc
- Advertise the said estate in terms of Section 29 of the Estate Act, inviting all the debtors and creditors of the deceased person
- Collecting of funds due to the estate
- Keeping heirs up to date with regard to the progress of the estate on a monthly basis
- Drafting of the Liquidation and Distribution Account and lodging same with the relevant institutions i.e. on behalf of the Administrator
- Filing documents
- Distribution of assets as per the Will or the relevant sources of the law i.e. Estate Act.
- Finalization of the estate when we have complied with the Act

Company:	**Master of the High Court (Pretoria)**
Period:	October 1999 – September 2003
Position:	Estate Controller

Responsibilities:

- Advise/Assist the Members of Public with the reporting of the deceased estates/registration of inter vivos trusts.
- Attend to and issue inter vivos trusts appointments in terms of Section 13 and 18 (3) of the Administration of the Estate Act No. 66 of 1965
- Recommendations on the acceptance or rejections of the Will to the Assistant Master
- Preparation and final steps in respect of the following: Out of hand sale of the estate's assets in terms of Section 47 of Act 65/66 and taking over of assets by the surviving spouse in terms of Section 38 of Ac 66/65
- Preparation and convening of meetings for election of the Executor and Curators
- Preparation and issuing of provision reports of estate duty upon executor's request and the keeping of an applicable reporting register in terms of Section 10 (2) of Act 66/65
- Control for lodgment of the Executors/Curators and Tutors account; Executor's inventory where security is lodged and;
- The general compliance of the Act and that the distributions are done accordingly.

Company:	**Magistrate Court (Pretoria)**
Period:	January 1999 – October 1999
Position:	Registry Clerk

Responsibilities:

- Granting of Emolument attachment orders
- Distribution of Judgment to the relevant Magistrates

EDUCATION DETAILS

Qualification	Institution	Period
LLB	University of South Africa	2021
National Diploma in Legal Assistance	Tshwane University of Technology	2003
Matric	Molomoatau High School	1997

SKILLS

- Proficient in Microsoft Office 2007 (MS Word, Excel, PowerPoint, Outlook and Internet)
- Communication skills: written and verbal
- Report writing and analytical skills
- Organizational and administration skills
- Negotiating skills