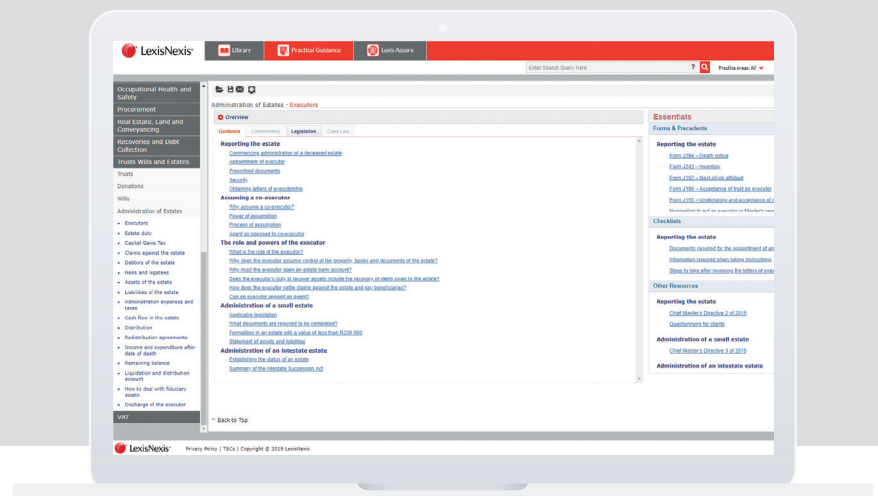


# Trust, Wills & Estates



## A practical legal 'how to' guide

Lexis® Practical Guidance will help you through the practicalities of forming a trust, preparing a will and implementing an estate plan from start to finish. Essential, easy-to-use information is styled for practitioners, founders, trustees, beneficiaries and legal advisors. Download forms, access detailed guidance, practical examples, relevant legislation and precedent-setting case laws that are applicable to trusts, wills and estates.

## Why Lexis® Practical Guidance: Trusts, Wills and Estates?

Users get direct access to critical, up-to-date information and guidance that they can rely on. Lexis® Practical Guidance Trusts, Wills and Estates is a web-based solution that keeps legal professionals abreast of the ever-changing estate planning and trusts landscapes. Lexis® Practical Guidance Trusts, Wills and Estates covers the formation, types and general principles of a trust, the creation of wills and the principles that govern them, as well as processes involved in the administration, liquidation, distribution and tax-calculations of an estate. Lexis® Practical Guidance Trusts, Wills and Estates provides downloadable forms and detailed precedents

of various letters, notices and applications, that are styled for easy use by practitioners, founders, trustees, beneficiaries and legal advisors. Users also have direct access to practical examples, relevant legislation and precedent-setting case law that are applicable to Trusts, Wills and Estates.

## Stay compliant

Practical Guidance is a comprehensive online toolkit. Acting as a quick reference guide, a precedent bank and a trusted resource tool, this easy-to-navigate online resource gives you detailed, up-to-date information across 30 Trusts, Wills and Estates topics and offers over 260 forms, precedents, checklists and other resources for practical implementation. The result? Speedy access to accurate and relevant information, expert opinion, and practical resources in a user-friendly format on a single platform.

## Who should use this guide?

- Candidate attorneys
- Attorneys
- Advocates
- Legal advisors
- Legal consultants

For the latest practical legal guidance, visit our website for a free demo or more information.  
[lexisnexis.co.za/pg/trusts-wills-estates](https://lexisnexis.co.za/pg/trusts-wills-estates)

## Resources include:

- Over 30 topic overviews
- Over 110 Guidance notes, including practical process aids
- Up-to-date judgments for reference
- Over 260 customisable forms, precedents, checklists and other resources to ensure not a single step is missed, including:
  - Agreements
  - Affidavits
  - Wills
  - Deeds
  - Official government forms

The screenshot shows the LexisNexis website interface. The top navigation bar includes 'Library', 'Practical Guidance', and 'Lexis Assure'. A search bar is present with the text 'Enter Search Query Here'. The main content area is titled 'Trusts' and features a 'Guidance' tab selected. The page is annotated with letters A through F:

- A** points to the 'Guidance' tab.
- B** points to the 'What legislation is relevant to trusts' section.
- C** points to the 'Common law applicable to trusts' section.
- D** points to the 'Essentials' sidebar.
- E** points to the 'Checklists' section in the sidebar.
- F** points to the 'Other Resources' section in the sidebar.

## A Guidance Notes

Over 30 topic overviews and over 160 guidance notes. Guidance notes steer the reader through the practicalities of implementing an estate plan as well as providing guidance relevant to founders, trustees, beneficiaries, legal advisors and attorneys on the formation and use of various forms of trusts, whether part of an estate plan or not. In addition, important information on the liquidation and distribution of estates has been included along with examples of key documents from practice to guide users through the process of winding up an estate.

## B Legislation

Trusts, Wills and Estates provides access to the most relevant and up-to-date legislation, including:

- Administration of Estates Act 66 of 1965
- Children's Act 38 of 2005
- Deeds Registries Act 47 of 1937
- Estate Duty Act 45 of 1955
- Insolvency Act 24 of 1986
- Intestate Succession Act 81 of 1987
- Maintenance Act 99 of 1998
- Maintenance of Surviving Spouses Act 27 of 1990
- Matrimonial Property Act 88 of 1984

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- Trust Property Control Act 57 of 1988
- Wills Act 7 of 1953

## C Case Law

The Case Law tab provides access to precedent setting judgments. This case law is also discussed and unpacked within the relevant Guidance note.

## D Forms and Precedents

Over 160 forms and precedents. Provides access to customisable precedents with drafting tips and downloadable forms. There are precedents of the various settlement agreements, applications and affidavits as well as the relevant official government forms that are commonly used.

## E Checklists

Over 20 checklists. Checklists provide step-by-step information on how to draft various agreements, applications and affidavits.

## F Other Resources

Over 78 other resources. Contains guides, flowcharts and relevant practical aids that provide useful information allowing you to execute tasks accurately.