



# TRUSTS: AN INTRODUCTION TO THE LEGAL, TECHNICAL, TAX AND FINANCIAL PLANNING IMPLICATIONS



8 hours remote learning

Held over 4 days

## THE COURSE AT A GLANCE

Deepen your understanding of trusts and learn when a trust is an appropriate vehicle to use in financial planning.

Trusts are useful in financial planning because of the various advantages they offer, but they must be structured correctly to get the full benefit. This course will look at: different types of trusts, the various role players, trust management, the duties of trustees, the amendment of trust deeds, taxation, and financial planning tips and traps.

- DATE:** 27 to 30 July 2021
- TIME:** 15:00 to 17:00 - SAST
- NUMBER OF HOURS:** Eight hours, over four days
- FEE:** R2,200 per delegate. The fee includes any course materials. Full payment must be received three days before the course starts.
- PRESENTER:** **Melanie Louw** - legal advisor, Sanlam; previously at Old Mutual, Momentum and ABSA Wealth
- COURSE FORMAT:** Presented remotely on Zoom
- CERTIFICATE:** A certificate of attendance from UCT
- DEADLINE:** Registrations close three days before the course starts

## TO REGISTER OR FOR MORE INFORMATION:

Email: Don Coue on [don.coue@uct.ac.za](mailto:don.coue@uct.ac.za)

Or visit: [www.lawatwork.uct.ac.za](http://www.lawatwork.uct.ac.za)