



THE FIDUCIARY INSTITUTE OF SOUTH AFRICA



Please submit completed application form and attachments to:

***The Secretary  
The Fiduciary Institute of South Africa  
P O Box 27076  
BENROSE  
2011***

On the basis of having met the stipulated examination requirements, I hereby apply for associate membership and for certification as :-

- |  |   |
|--|---|
| <input type="checkbox"/> Wills Drafter                                     | <input type="checkbox"/> Senior Wills Drafter         |
| <input type="checkbox"/> Estates Administrator                             | <input type="checkbox"/> Senior Estates Administrator |
| <input type="checkbox"/> Trust Administrator                               | <input type="checkbox"/> Senior Trust Administrator   |
| <input type="checkbox"/> Estate and Financial Planning Practitioner        |   |
| <input type="checkbox"/> Senior Estate and Financial Planning Practitioner |   |

(Where, exceptionally, the candidate does not meet the stipulated examination requirements, but nevertheless seeks certification, the reasons for this being warranted should be stated concisely below)

Last name : Mr / Mrs / Miss / Ms \_\_\_\_\_

First name(s) : \_\_\_\_\_

Identity Number: \_\_\_\_\_

Address : \_\_\_\_\_

\_\_\_\_\_

Postal code : \_\_\_\_\_

Telephone no. : \_\_\_\_\_

Email address : \_\_\_\_\_

: 2 :

Employer : \_\_\_\_\_

Address : \_\_\_\_\_

\_\_\_\_\_

Postal code : \_\_\_\_\_

Telephone no. : \_\_\_\_\_

**Professional Experience** Please provide a maximum of fifteen years professional experience. If you have been with the same employer for the past fifteen years, please use the separate sections below to indicate the different positions you have held

**1. Current Position**

Date upon which you took up this position : \_\_\_\_\_

Job title : \_\_\_\_\_

Please describe your responsibilities :

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

: 3 :

**2. Employer**

Dates of employment : (From) \_\_\_\_\_ (to) \_\_\_\_\_

Job title : \_\_\_\_\_

Please describe your responsibilities :

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**3. Employer**

Dates of employment : (From) \_\_\_\_\_ (to) \_\_\_\_\_

Job title : \_\_\_\_\_

Please describe your responsibilities :

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**(If you require additional space, please attach a separate sheet)**

**Educational Requirements** (Please tick appropriate block(s))

- Estate and Trust Administrators Certificate of the Institute of Bankers in South Africa
- Estate and Financial Planning Certificate of the Institute of Bankers in South Africa
- Trustee Licentiate Diploma of the Institute of Bankers in South Africa
- Bachelors Degree Certificate
- FPI Certificate
- Other (please specify)

(Documentary proof of a qualification must be attached)

Where a stipulated qualification is not held, and certification is nevertheless sought on an exceptional basis, brief details of a candidate's general educational background should be given, and documentary proof of any qualifications should be attached.

**CERTIFICATE BY APPLICANT**

I, the applicant, do hereby attest that the information I have provided in this application, and the attachments hereto, are true and correct. I further attest that I have read the Code of Ethics of the Fiduciary Institute, and do solemnly agree to abide by the said code at all times.

I attach a cheque in the amount of R \_\_\_\_\_ in respect of payment of the certification fee.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_  
\_\_\_\_\_ (Applicant)

**CERTIFICATE OF COMPETENCY AS A WILLS DRAFTER**

I, \_\_\_\_\_, in my capacity as the representative / alternate representative of \_\_\_\_\_, on the main board of the Fiduciary Institute, do hereby certify that the applicant has the necessary experience in and has proved himself / herself to be fully competent in the drafting of Last Wills and Testaments, to the degree that he / she can be certified to be a professional in this field.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_  
\_\_\_\_\_ (Co. Representative)

**CERTIFICATE OF COMPETENCY AS A SENIOR WILLS DRAFTER**

I, \_\_\_\_\_, in my capacity as the representative / alternate representative of \_\_\_\_\_, on the main board of the Fiduciary Institute, do hereby certify that the applicant has the necessary experience in and has proved himself / herself to be fully competent in the drafting of Last Wills and Testaments, to the degree that he / she can be certified to be a professional in this field.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_  
\_\_\_\_\_ **(Co. Representative)**

**CERTIFICATE OF COMPETENCY AS AN ESTATES ADMINISTRATOR**

I, \_\_\_\_\_, in my capacity as the representative / alternate representative of \_\_\_\_\_, on the main board of the Fiduciary Institute, do hereby certify that the applicant has the necessary experience in and has proved himself / herself to be fully competent in the administration of deceased estates, to the degree that he / she can be certified to be a professional in this field.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_  
\_\_\_\_\_ **(Co. Representative)**

**CERTIFICATE OF COMPETENCY AS A SENIOR ESTATES ADMINISTRATOR**

I, \_\_\_\_\_, in my capacity as the representative / alternate representative of \_\_\_\_\_, on the main board of the Fiduciary Institute, do hereby certify that the applicant has the necessary experience in and has proved himself / herself to be fully competent in the administration of deceased estates, to the degree that he / she can be certified to be a professional in this field.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_  
\_\_\_\_\_ **(Co. Representative)**

**CERTIFICATE OF COMPETENCY AS A TRUST ADMINISTRATOR**

I, \_\_\_\_\_, in my capacity as the representative / alternate representative of \_\_\_\_\_, on the main board of the Fiduciary Institute, do hereby certify that the applicant has the necessary experience in and has proved himself / herself to be fully competent in the administration of Trusts, to the degree that he / she can be certified to be a professional in this field.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_

**(Co. Representative)**

**CERTIFICATE OF COMPETENCY AS A SENIOR TRUST ADMINISTRATOR**

I, \_\_\_\_\_, in my capacity as the representative / alternate representative of \_\_\_\_\_, on the main board of the Fiduciary Institute, do hereby certify that the applicant has the necessary experience in and has proved himself / herself to be fully competent in the administration of Trusts, to the degree that he / she can be certified to be a professional in this field.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_

**(Co. Representative)**

**CERTIFICATE OF COMPETENCY AS AN ESTATE AND FINANCIAL PLANNING PRACTITIONER**

I, \_\_\_\_\_, in my capacity as the representative / alternate representative of \_\_\_\_\_, on the main board of the Fiduciary Institute, do hereby certify that the applicant has the necessary experience in and has proved himself / herself to be fully competent in the field of estate and financial planning, to the degree that he / she can be certified to be a professional in this field.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_

**(Co. Representative)**

**CERTIFICATE OF COMPETENCY AS A SENIOR ESTATE AND FINANCIAL PLANNING PRACTITIONER**

I, \_\_\_\_\_, in my capacity as the representative / alternate representative of \_\_\_\_\_, on the main board of the Fiduciary Institute, do hereby certify that the applicant has the necessary experience in and has proved himself / herself to be fully competent in the field of estate and financial planning, to the degree that he / she can be certified to be a professional in this field.

Signed at \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_ 2009.

Witnessed by : \_\_\_\_\_

**(Co. Representative)**