

Protecting what matters most your family, your wealth & your legacy

September brings two important reminders:
Wills Month and Childhood Cancer Awareness Month. At **Wealth Associates Fiduciary Service**, we believe they share a powerful message:
Protect what matters most.

A Will is more than a legal document. It is about protecting the people you love, creating certainty for your family and ensuring that your wishes are carried out when you are no longer here. But your Will can also be about the legacy you leave beyond your family. This September, as we focus on the importance of having a Will, we are also proud to shine a light on **CHOC CHILDHOOD CANCER FOUNDATION SOUTH AFRICA**, which supports children and teenagers diagnosed with cancer or life-threatening blood disorders, together with their families. For those who want their estate plan to make a difference, a charitable bequest to CHOC can form part of your Will, allowing you to support a cause that matters to you while creating a meaningful legacy. There is also an important estate planning consideration.

CHOC is a registered Public Benefit Organisation (PBO) with Section 18A approval. A qualifying donation made during your lifetime may provide an income-tax benefit, subject to the applicable requirements and limits. Importantly, a qualifying bequest to CHOC in your Will may also qualify for a deduction for estate-duty purposes, as property bequeathed to a qualifying PBO can be excluded from the dutiable estate in terms of section 4(h) of the Estate Duty Act. In other words, your Will can protect your family while also extending your legacy to help protect the lives and futures of others. That is where estate planning becomes more than simply deciding who receives your assets.

It becomes about asking:

- What do I want to protect?
- Who do I want to provide for?
- And what difference do I want my wealth to make?

True wealth planning brings together financial planning, investments, risk and life cover, retirement planning, tax, trusts and estate planning - all working together to protect what you have built and provide for the people who matter most.

So, this September, ask yourself:

- Is my Will up to date?
- Is my family adequately protected?
- Are my investments, risk, retirement and tax planning working together?
- Does my estate plan reflect what matters most to me?
- And could my legacy make a difference beyond my own family?

At Wealth Associates Fiduciary Service, we believe wealth is not simply about what you accumulate. It is about how you protect it, how you plan it, and the legacy you leave behind. Plan for your family. Protect your wealth. Give with purpose. Leave a legacy.

#WealthAssociates #WillsMonth
#ChildhoodCancerAwareness #CHOC #EstatePlanning
#FinancialPlanning #TaxPlanning #LegacyPlanning
#FamilyProtection #Section18A #WealthManagement



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Connect with us

We would welcome the opportunity to assist you with your trust and estate planning needs.

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