



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Explain And Apply The Basic Principles Of The Estate Duty Act 45 Of 1955 Training

Business, Commerce and Management Studies / Finance, Economics and Accounting

Unit Standard 119678 · NQF Level 4 · 2 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the foundational knowledge and skills to interpret and apply the Estate Duty Act 45 of 1955. Participants will understand the principles of estate duty, including the calculation of dutiable amounts, allowable deductions, and the submission requirements. The training ensures compliance with South African tax legislation and enhances professional competence in estate planning and administration.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	119678
Accreditation	SAQA Accredited · NQF Level 4 · 2 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Explain the purpose and scope of the Estate Duty Act 45 of 1955.
- Apply the principles of estate duty to determine dutiable assets and liabilities.
- Calculate estate duty payable, including allowable deductions and rebates.
- Analyze the impact of donations, trusts, and life insurance on estate duty.
- Demonstrate the process of lodging estate duty returns and related documentation.
- Evaluate the implications of non-compliance with the Estate Duty Act.

WHO SHOULD ATTEND

- This course is designed for financial advisors, tax practitioners, estate planners, legal professionals, and anyone involved in the administration of deceased estates.
- It is also suitable for learners seeking a foundational understanding of estate duty in South Africa.

COURSE OUTLINE

Day 1: Fundamentals of Estate Duty and Application of Act 45 of 1955

- Introduction to estate duty: history, purpose, and key concepts.
- Property included in the estate: section 3 property, deemed property, and exceptions.
- Deductions: funeral expenses, debts, administration costs, and bequests to surviving spouses.
- Valuation principles: market value, date of death valuation, and special rules for certain assets.
- Calculation of estate duty: dutiable amount, rates, rebates, and abatement.
- Reporting and payment: timelines, forms, and executor responsibilities.
- Practical examples and case studies.

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **2 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 12,800.00	R 12,800.00
1	In-House	R 16,600.00	R 16,600.00
1	On-Campus (Pretoria)	R 19,200.00	R 19,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	10 Aug 2026	On-Campus	Abu Dhabi, UAE
11 Aug 2026	11 Aug 2026	On-Campus	Durban, South Africa
11 Aug 2026	11 Aug 2026	On-Campus	Mauritius
12 Aug 2026	12 Aug 2026	On-Campus	Cape Town, South Africa
13 Aug 2026	13 Aug 2026	On-Campus	Dubai, UAE
14 Aug 2026	14 Aug 2026	On-Campus	Pretoria, South Africa
17 Aug 2026	17 Aug 2026	On-Campus	Durban, South Africa
18 Aug 2026	18 Aug 2026	On-Campus	Shenzhen, China

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 119678) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call +27 12 004 8389 or WhatsApp +27 65 077 6310 and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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