

## **MERVIN MESSIAS**

JD (Juris Doctor) / BA, LLB (Wits) / TEP (Trust & Estate Practitioner) / MTP ( Master Tax Practitioner – S.A)

Mervin is a trust specialist, solving trust matters, including wills, estate planning and tax. He has over forty years plus experience in the legal profession.

His experience includes matters such as:

- Trusts that do not meet legal requirements
- Incorrectly drafted trusts
- Trust disputes
- Tax issues related to Trusts
- Succession Trust matters in Estate Planning
- Tax and Trusts in Deceased Estates
- The drafting of wills
- Will disputes

### **Qualifications:**

- Law qualifications in seven countries

### **Achievements:**

- Admitted Attorney, Solicitor and Barrister
- Registered as a Master Tax Practitioner with the South African Institute of Tax Practitioners
- Member of the Law Society of South Africa's committee on Trusts and Estates
- Admitted as a member of the International Society of Trust and Estate Practitioners (STEP)
- Admitted as a member of the Association of practicing Attorneys in the United States of America, specializing in Estate Planning and awarded a JD (Juris Doctor)
- Former Chairperson of the International Society of Trust and Estate Practitioners, Johannesburg Branch, South Africa (STEP)
- Admitted as academician of the International Academy of Estate and Trust Law (2011)
- Former member of the Law Society of the Northern Provinces Deceased Estates Committee

- Appointed as trustee, protector and executor in numerous trusts and estates, participating in the structuring, administration, interpretation and resolution of disputes in regard to trusts and administration of estates
- Past Chairperson of the committee on Trusts and Estates (Estate Planning) of the Gauteng Law Council
- Past Convenor of the Trusts and Estates Committee of the Life Underwriters Society of South Africa (LUASA)
- International trusts and estates- attended to the creation and administration of trusts, advising on investments of wealth in the trust structures and acting as an executor
- Extensive experience in creating Estate Plans, advising on Trust tax issues, administering trusts, conducting trust litigation and generally solving Trust matters
- Practising attorney and head of law firm specializing in Estate Planning from 1980-2018
- Former Member of FISA (Fiduciary Institute of Southern Africa)
- South African Trust & Estates law expert for Global Law Experts (GLE)
- Received the Best Lawyers awards as a best Trust Lawyer in South Africa for 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016 and 2017.

#### **Presentations:**

- Convenor and presenter of seminars on Trusts and Estates for Attorneys
- Conducted seminars for Financial Planners on Estate Planning, Trusts, Wills and Estates
- Lectured for L.E.A.D (Legal Education and Development) to attorneys on Trusts and Tax in Johannesburg, Cape Town, Durban, Bloemfontein, Port Elizabeth and East London (2008)
- Designed an Estate Planning, Trusts and Estates course for Financial Planners accredited by the Financial Planning Institute in South Africa

#### **Articles and Letters:**

- Contributing columnist on legal articles, including Trusts and Estates, for the Gauteng Law Councils publication
- Appointed as the lead editorial member for the South African Johannesburg branch of the Society of Trust and Estate Practitioners (STEP)
- Contributing columnist on articles on Trusts and Estates for “ AVANTI” the international publication of Europe, Mediterranean, Africa & Indian Ocean region committee of The Society of Trust and Estate Practitioners (STEP)
- Contributing columnist on articles on Trust and Estates published in “Insight”, the journal of the Association of Professional Financial Planners.

- Contributing columnist on legal articles for the Financial Intermediaries Association of South Africa
- Award winning Trust Disputes Lawyer of the Year in South Africa – 2018

**Television Appearances for:**

- Red Pepper Productions regarding Wills and Trusts
- Summit TV regarding Essentials of Estate Planning, Reducing Taxes through proper Estate Planning & Offshore diversification