

## Advisory 2: 2016 Fidelity Fund certificate applications to be done online

The 2016 Attorneys Fidelity Fund Certificate Application Form was gazetted on [30 September 2015](#). To assist practitioners, the new application form has been automated and applications will be accepted only through this online process. We will advise practitioners as soon as the online application is available.

In preparation for submission of your Fidelity Fund Certificate Application for 2016 using the new online application, based on the new Application Form Regulations, you need to be ready with the following:

- Trust Account/s balances for the previous four quarters ended (31/12/2014; 31/03/2015; 30/06/2015 and 30/09/2015) for the following accounts:
  - Section 78(1) - to be reported individually for each s78(1) account held by the firm
  - Section 78(2)(a) - to be reported individually for each s78(2)(a) account held by the firm
  - Section 78(2A) - total balances to be reported per financial institution
  - Estates - total balances to be reported per financial institution
  - Properties (other entrusted assets) - total balances to be reported per category as indicated on the online application. These categories are: Movable Assets; Immovable Assets; Financial Instruments and Other.
- Service charge formulae for the trust accounts.
- FICA registration number.
- Financial Services Provider (FSP) number (if running an investment practice).
- Firm's registration number (for incorporated practices).

In addition to the above, please ensure the following:

- That your statutory provincial Law Society is in receipt of your unqualified audit report.



[Download](#)

**Government Gazette 39239  
of 30 September 2015.**

[Click here](#) to view the 'Frequently asked questions on the Attorneys Fidelity Fund's website.

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- You have completed the Practice Management Training (PMT), where applicable.
- You have paid over all interest as well as any other monies due to the statutory provincial Law Society.
- If you are in a firm with more than one member, identify a firm's representative who will capture the financial information of the firm on the online application. A member of the firm will be required to create that representative on the online application at member's login.

8 October 2015