

How to add Beneficial Owners on Company Registers

After you've set up your Sec Holders, Allotments and Transfers, navigate to the All Owners menu item;

The screenshot shows a web interface for 'Awesome Demo Company (Pty) Ltd'. On the left is a navigation menu with 'Registers' expanded to show 'Company / CC / Trust'. Under this, 'All Owners' is highlighted. Below the navigation, there are buttons for 'Print All Registers', 'Status', 'Tasks', 'Details', 'Annual Returns', 'Registered Office', 'Location of Records', 'Res / Mins / Docs', 'Officers', 'Directors', and 'CIPC History'. The main area is titled 'All Owners' and contains a table with the following data:

<u>Surname / Entity</u>	<u>First Names</u>	<u>Sec Holder</u>	<u>Ben.Own.</u>			
Company A (PTY) Ltd		%				
Person	Natural					
Robinson	Stacey	%				

Below the table are buttons for '+ Add New', 'Print List', '← Previous', '→ Next', and '✓ OK'.

How to add Beneficial Owners on Company Registers

Here you can add Beneficial Owners, to be assigned on the Beneficial Owners menu item. Click 'Add New' and let's add a new BO;

The formula to remember when adding Beneficial Owners and Sec Holders is:

Beneficial Owner = Natural person/Warm body.

An Entity, such as a company, can be a Securities Holder but not a beneficial owner.

How to add Beneficial Owners on Company Registers

Awesome Demo Company (Pty) Ltd

Update Securities Holder / Member:

Details > Addresses > Phone Nos (optional)

Details

Copy from Search	<input type="text"/>	<input type="button" value="?"/>
Securities Holder	<input type="button" value="X No"/>	
Beneficial Owner	<input checked="" type="checkbox"/> Yes	
Surname / Entity	<input type="text" value="Person B"/>	
First Names	<input type="text"/>	
ID Type	<input type="text" value="SA ID Document"/>	
ID Country of Issue	<input type="text" value="If not SA"/>	
ID / Passport No	<input type="text" value="123456"/>	
Upload ID Doc / Passport	<input type="button" value="+ Add File"/>	
Date of Birth	<input type="text" value="25/11/1978"/>	<input type="button" value="?"/> dd/mm/yyyy
Email Address	<input type="text"/>	
Income Tax No	<input type="text"/>	Optional

How to add Beneficial Owners on Company Registers

1. Once the details have been added, click 'Save' and navigate to the Beneficial Owners menu item;

Awesome Demo Company (Pty) Ltd

Beneficial Owners

Securities Class: [Add Sub Holder then Drag n Drop for Order](#)

<u>Surname / Entity</u>	<u>First Names</u>	<u>Sec Holder</u>	<u>Ben.Own.</u>	<u>No. Reg. Secs.</u>	<u>%age Secs.</u>	
Company A (PTY) Ltd				60.00	60.00 %	
<input type="button" value="+ Add Sub Holder"/>						
Robinson	Stacey			40.00	40.00 %	
				100.00	100.00 %	

How to add Beneficial Owners on Company Registers

2. Highlight the Entity you wish to add a BO to, and click 'Add Sub Holder', the Update Sub Holder page will appear.

Select the question mark next to 'Sub Holder' and select your BO from the records we added previously. You can also add BO's right from this screen by selecting 'Add New';

Make sure you have the correct class of shares selected from the drop-down box.

Update Sub Holder

Details

Securities Class ?

Securities Holder ?

Sub Holder ?

Select Securities Holder ×

Surname / Entity	First Names	
Company A (PTY) Ltd		<input checked="" type="checkbox"/>
Company B (Pty) Ltd		<input checked="" type="checkbox"/>
Person B	Someone	<input checked="" type="checkbox"/>
Person A	Somebody	<input checked="" type="checkbox"/>
Robinson	Stacey	<input checked="" type="checkbox"/>

How to add Beneficial Owners on Company Registers

3. Select the Level and Percentage of ownership and click 'Save' ;

Update Sub Holder

Details

Securities Class	<input type="text" value="Common Shares"/>	<input type="button" value="?"/>
Securities Holder	<input type="text" value="Company"/>	<input type="button" value="?"/>
Sub Holder	<input type="text" value="Company B (Pty) Ltd"/>	<input type="button" value="?"/>
Level	<input type="text" value="1"/>	A Number
Percentage Ownership	<input type="text" value="50"/>	A Number

How to add Beneficial Owners on Company Registers

Company B has been added as a Beneficial Owner of Company A;

Awesome Demo Company (Pty) Ltd

Beneficial Owners

Securities Class: Common Shares Add Sub Holder then Drag n Drop for Order

Surname / Entity	First Names	Sec Holder	Ben.Own.	No. Reg. Secs.	%age Secs.	
Company A (PTY) Ltd				60.00	60.00 %	
--Company B (Pty) Ltd 50.00 %						
				50.00 %		
+ Add Sub Holder						
Robinson	Stacey			40.00	40.00 %	
				100.00	100.00 %	

+ Add New Sec. Holder

Print List Organogram

← Previous → Next ✓ OK

How to add Beneficial Owners on Company Registers

Let's add a Sub Holder to Company B. Repeat steps 1 – 3, but select Level 2 on step 3;

Update Sub Holder

Details

Securities Class	<input type="text" value="Common Shares"/>	<input type="button" value="?"/>
Securities Holder	<input type="text" value="Company"/>	<input type="button" value="?"/>
Sub Holder	<input type="text" value="Person B"/>	<input type="button" value="?"/>
Level	<input type="text" value="2"/>	A Number
Percentage Ownership	<input type="text" value="100"/>	A Number

How to add Beneficial Owners on Company Registers

Person B has been added as a Beneficial Owner of Company B;

When you add multiple Owners, you will need to drag n drop them into the correct order.

Awesome Demo Company (Pty) Ltd

Beneficial Owners

Securities Class: [Add Sub Holder then Drag n Drop for Order](#)

Surname / Entity	First Names	Sec Holder	Ben.Own.	No. Reg. Secs.	%age Secs.	
Company A (PTY) Ltd				60.00	60.00 %	
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><div style="display: flex; justify-content: space-between; align-items: center;"> --Company B (Pty) Ltd50.00 %</div><div style="display: flex; justify-content: space-between; align-items: center;"> --Person B Someone 30.00 % 100.00 %</div><div style="display: flex; justify-content: space-between; align-items: center;">30.00 % 150.00 %</div></div> <div style="margin-top: 5px;">+ Add Sub Holder</div>						
Robinson	Stacey			40.00	40.00 %	
				100.00	100.00 %	

+ Add New Sec. Holder

Print List Organogram

← Previous → Next ✓ OK

How to add Beneficial Owners on Company Registers

Let's add a few more records and then print the Organogram;

The percentages in the '%' column have been automatically calculated. The records in the black outlined boxes indicate shareholders in the Parent Entity, Awesome Demo Company (Pty) Ltd.

The Head icon indicates a Beneficial Owner.

Note again: An Entity, such as a company, can be a Securities Holder but not a Beneficial Owner.

For example, if Company B owns shares in Awesome Demo Company, Company B = Securities Holder.






If Some Trust owns share in Company B, Some Trust is added as a sub-holder with neither the Sec Holder or Ben Owner boxes ticked.

How to add Beneficial Owners on Company Registers

Awesome Demo Company (Pty) Ltd

Registration Number: 1234/125468/12

Security Holders Organogram Common Shares














Security Holder Sub Holder	Ben. Own.	%	Securities %
Company A (PTY) Ltd			60.00 %
-- Person A Somebody		24.00 %	40.00 %
-- Some Trust		6.00 %	10.00 %
-- Person C C Someone		6.00 %	100.00 %
-- Company B (Pty) Ltd		30.00 %	50.00 %
-- Person B Someone		30.00 %	100.00 %
Robinson Stacey		40.00 %	40.00 %
		100 %	100 %

How to add Beneficial Owners on Company Registers

This Organogram is sufficient for uploading to CIPC, along with the CIPC Mandate that can be found under 'My Tasks - Mins/Resolutions';

My Accounting Practice

My Mins

Register	Task Description		
Allotment	* Directors Resolution - Allotment		
Auditors	* Directors Resolution		
Custom	Inaugural Meeting		
Custom	Board Resolution		
Custom	CIPC Authorisation		
Custom	CIPC Mandate		
DirAppoint	* Directors Resolution		
LocCoRecs	* Directors Resolution		
RegOffice	* Directors Resolution		

[+ Add New Minutes](#)

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For more information, do not hesitate to contact Stacey at support@companyregisters.co.za