

REQUIREMENTS FOR TAX SUBMISSIONS:

INCOME TAX RETURNS:

GENERAL:

- **Personal information and banking details:**
Please send through a Client Details form if any personal information has changed since the last tax season.
- **Declaration:**
Applicable 2023 tax declaration - signed (i.e. Company, Trust or Individual)
- **Travel deductions:**
If you are claiming travel against an allowance received / commission earned / business or contracting income:
*Your travel logbook, if you have kept one. If not, your opening and closing odometer readings for 2023.
Please advise if there are any changes to the vehicle used since your last submission*

NON-PROVISIONAL TAX PAYERS:

- IRP5 and/or IT3 certificate(s) reflecting income earned (*this includes interest from investments / banks*)
- Medical aid certificate
- Proof of medical expenses paid by you and not recovered from a medical scheme
- Retirement annuity contribution certificates (if we are not the brokers on record)
- All information relating to capital gain transactions (local and foreign), if applicable (*incl. cryptocurrencies*)
- Expenses claimed against commission, if the commission reflecting on your IRP5 is above 50% of all income
- Any information relating to income or distributions as a beneficiary of a Trust

PROVISIONAL TAX PAYERS and TRUSTS:

- IRP5 and/or IT3 certificate(s) reflecting income earned (*this includes interest from investments / banks*)
- Medical aid certificate
- Proof of medical expenses paid by you and not recovered from a medical scheme
- Retirement annuity contribution certificates (if we are not the brokers on record)
- All information relating to capital gain transactions (local and foreign), if applicable (*incl. cryptocurrencies*)
- Expenses claimed against income / commission
Note: Sending the proof of expenses claimed to Sars with the initial supporting document submission will speed up the verification / audit process and avoid additional requests from Sars
- Rental income and expenses, if applicable
- Any information relating to income or distributions as a beneficiary of a Trust
- All other documents relating to income that must be declared or deductions that may be claimed
- Updated statement of assets and liabilities (*template available on request*)
- **Trusts:** Financial statements
All certificates and documents relating to income and deductions
Proof of tax credits claimed
Particulars of assets and liabilities
Details of all beneficiaries
Trust Deed and Resolutions passed, if there have been any changes during the tax year

PROVISIONAL TAX RETURNS:

- The return due at the end of August is for the 1st period of the tax year (first 6 months)
Information required is for the period from 1 March to 31 July, with estimated income and expenses for August
The return due at the end of February is for the 2nd period of the tax year (next 6 months)
Information required is for the period from 1 March to 28 February, with estimated income and expenses for February*
- Your latest salary slip, if you receive income where PAYE has been deducted
 - Information relating to all other income and expenses claimed against the income
 - Medical aid and retirement annuity contributions for the period (*if we are not the brokers on record*)
 - Details of interest earned from banking or investment institutions (*if we are not the brokers on record*)
 - Capital gains information (including cryptocurrencies), *if we are not the brokers on record*
 - Rental income and expenses, if applicable
 - Details of any other income or transactions as a beneficiary of a Trust
 - Company income and expenses