

Please tick the documents you are submitting with this checklist. Only provide items that apply to your personal circumstances - if you are unsure, simply leave it blank and ask us.

EMPLOYMENT INCOME

IRP5 / IT3(a)
Commission income details (if applicable)
Travel Logbook (if claiming business travel)
Home Office information (if you worked from home and qualify)

INVESTMENT & SAVINGS INCOME

Interest Certificates (Banks)
Dividend Certificates
IT3(b)
IT3(c)
IT3(s)

RETIREMENT & MEDICAL

Medical Aid Tax Certificate
Retirement Annuity Certificate
Provident or Pension Fund Certificates (where applicable)

DONATIONS

Section 18A Donation Certificates

FOREIGN INCOME (IF APPLICABLE)

Employment contract
Payslips
Bank statements showing income received
Passport copies
Seaman's Book (where applicable)
Foreign Tax Certificate (if foreign tax was paid)

RENTAL INCOME (IF APPLICABLE)

Rental income received
Bond interest
Rates & Taxes
Levies
Insurance
Repairs & Maintenance
Any other rental expenses

BUSINESS / SOLE PROPRIETOR INCOME (IF APPLICABLE)

Bank Statements

Income received
Business expenses
Vehicle expenses
Telephone & Internet
Insurance
Advertising
Accounting fees
Any other business-related expenses

CAPITAL ASSETS SOLD

If you sold any of the following during the tax year, please provide details:

Property
Shares
Unit Trusts
Investments
Cryptocurrency
Other Capital Assets

ADDITIONAL INFORMATION

Please advise us if any of the following apply:

You started or closed a business
You emigrated or became a tax resident elsewhere
You received inheritance
You received foreign income
You changed employers
You received income not listed above

HOW TO SUBMIT YOUR DOCUMENTS

Please upload your documents through our Client Portal, or as advised by your consultant.