

TAX INFORMATION REQUIRED

Please note that the activation of your e-filing profile has been successful.

We have inspected your previous periods of assessment and identified that the following specific items have been applicable in your tax assessment:

Prior periods	Description	Document to be submitted
<input type="checkbox"/>	IRP 5 received as an employee.	IRP 5 certificate received from employer.
<input type="checkbox"/>	IRP 5 received related to a pension or other fund.	IRP 5 certificate received from institution.
<input type="checkbox"/>	Medical aid contribution.	Tax certificate issued by your medical aid in the name of the specific taxpayer.
<input type="checkbox"/>	Medical expenses.	Medical aid expense invoices in the name of the specific taxpayer for the taxpayer or dependants.
<input type="checkbox"/>	Investment income.	Tax certificates issued by the respective financial institution – this includes interest earned and dividends received. This includes foreign income.
<input type="checkbox"/>	Retirement annuity contributions or income protector contributions.	Tax certificate issued by the relevant institution in the name of the specific taxpayer.
<input type="checkbox"/>	Donations made.	Section 18A certificates issued by the respective institution the donation was made to.
<input type="checkbox"/>	Capital gains taxation.	Information relating to assets disposed of during the tax year. You need to supply us with the proceeds (selling price) and original cost price. Specific documents such as invoices etc. will need to be submitted as support for the values as mentioned.
<input type="checkbox"/>	Other income. <i>Insert example of the prior period.</i>	Any information of other income received for example rental income from a property owned etc. Supporting documents will need to be submitted. This includes foreign income.
<input type="checkbox"/>	Other deductions. <i>Insert example of the prior period.</i>	Any information of other deductions claimed for example legal costs etc. Supporting documents will need to be submitted.
<input type="checkbox"/>	List of personal assets and liabilities.	This needs to be completed for a director of a company or member of a close corporation. Enquire about our template for completion. Please inform us if you are a partner of a partnership.

<input type="checkbox"/> Claim against travel allowance received.	<p>Please confirm the following information or provide us with the updated information:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Vehicle make: insert detail as per prior period. <input type="checkbox"/> Vehicle model: insert detail as per prior period. <input type="checkbox"/> Vehicle cost price: insert detail as per prior period. <input type="checkbox"/> Year manufactured: insert detail as per prior period. <input type="checkbox"/> Registration number: insert detail as per prior period. <input type="checkbox"/> Closing km prior period: insert detail as per prior period. <p>You need to provide the following information:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Logbook indicating business km travelled; <input type="checkbox"/> Closing km as at 28 February 2015; <input type="checkbox"/> Updated details for incorrect items above. <p>Should you wish to claim the specific expenses relating to the vehicle utilised or did not keep a logbook, please provide us with supporting documents of expenses related to the specific vehicle incurred such as:</p> <ul style="list-style-type: none"> Insurance; Fuel costs; Cost price and date of purchase; Lease payments (financing statements); and Maintenance and service costs.
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Review the list of supporting documents as set out in table and ensure that you provide us with all relevant supporting documentation. The indicated items are **merely a guideline** in terms of prior period of assessments.

The tax payer has the final responsibility for the income tax return and therefore you should review the individual income tax return carefully for any omissions, misstatements or inaccuracies before signing and before the submission of tax returns.

In addition to the supporting documents, as set out above, you need to submit the following documents to us:

- Copy of your ID document or Passport;
- Signed engagement letter; and
- Signed power of attorney form.

We are restricted in terms of regulatory requirements to perform any work in terms of the tax forms without these signed documents.

These forms have been attached to the email you have received in relation to your tax affairs.

At the end of this form you can find an easy-to-use checklist to ensure that you submit all relevant documentation to us.

Should you have any queries regarding the above mentioned information please do not hesitate to contact us.

Rest assured of our best service at all times. Your business Our Priority.

Yours sincerely,



Kobus Viviers

Tax Practitioner

Synédrio Consulting Services Proprietary Limited



Synédrio

Individual Taxation Checklist for Submission of Information

Please note that all information should be submitted electronically via email to tax@synedrio.co.za. Alternatively you can deliver copies of the relevant document to our offices.

We suggest that you print this list and check of the relevant boxes when collating and submitting your information to us.

Check box	Document	Required or optional
	Copy of your ID document or passport.	Required
	Signed engagement letter.	Required
	Signed power of attorney.	Required
	IRP 5 from employer.	Dependent on taxpayer
	IRP 5 from other institution.	Dependent on taxpayer
	Medical aid tax certificate.	Dependent on taxpayer
	Medical expenses (over the counter) supporting documents.	Dependent on taxpayer
	Tax certificate for interest or dividends from financial institutions.	Dependent on taxpayer
	Retirement annuity tax certificate.	Dependent on taxpayer
	Section 18A certificates.	Dependent on taxpayer
	Information in terms of assets disposed of.	Dependent on taxpayer
	Information in terms of other income.	Dependent on taxpayer
	Information in terms of deductions.	Dependent on taxpayer
	Information in relation to travel claim against allowance received.	Dependent on taxpayer
	Personal assets and liabilities.	Dependent on taxpayer
	Other relevant documents.	Dependent on taxpayer

It is your responsibility to provide us with complete reliable, accurate and timeous information in respect of your taxation affairs in order for us to provide the required services. Any failure to provide such documents and information or to do so within the advised timeframes, will impede our services, and may require us to suspend our services or withdraw from the engagement.

