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Year End Information Required To Complete Personal Tax Calculations And Financial Statements

INDIVIDUAL

1. IRP5 / IT 3 certificates (salary, Gratuity received and/or Lump Sum from pension / provident funds.
2. Interest statements IT3(a) or IT3 Certificates.
3. Retirement Annuity Certificates.
4. Medical Aid Contribution and expenses/ Statement from Medical aid.
5. Section 18(a) Donation Certificates
6. Income Protection Fund Certificates
7. Logbooks with kilometers – travelling allowances
8. Capital Gains Tax – details of any affected assets that were sold, valuations of assets subject to Capital Gains Tax, details of sale or disposal of assets
9. Rental Income together with rental expenses, e.g. levies, bond statements, repairs & maintenance, etc

BUSINESS (IF ANY)

1. Cash book or computer printouts of trial balance for the tax year
2. VAT 201 returns for the tax year
3. List of stock on hand at year end
4. List of creditors as at year end
5. Bank statements, cheques/deposit books for the tax year
6. List of debtors at year end
7. Cash on hand at year end
8. New lease, rental and installment sale agreements with finance houses (i.e. Stannic, Wesbank)
9. List of bad debts
10. Building Society/ Bank/ Bond/ Statements for the year
11. A back-up of your set of records is also required