

PERSONAL TAX RETURN CHECKLIST FOR 2017 - and prior years where & if applicable

PERSONAL INCOME TAX CERTIFICATES -Required	TICK IF ATTACHED	Comments	
COPY OF ALL IRP5 / IT3B RECEIVED FROM YOUR EMPLOYER(S)			
IT3(a) OTHER INCOME: DIRECTORS RUMUNERATION			
LUMP SUM PAYMENTS: RETIREMENT ANNUITY/ PENSION			
INTEREST EARNED - FROM BANKS, INVESTMENTS, LOANS			
FOREIGN INVESTMENT INCOME			
YOUR PERSONAL CONTRIBUTION CERTIFICATES	TICK IF ATTACHED	Comments	
RETIREMENT ANNUITY FUND (EG LIBERTY)			
PENSION FUND CONTRIBUTIONS			
PERSONAL INSURANCE (BESIDES LIFE ENDOWMENT & SHORT TERM)not householders insurance			
MEDICAL AID - CERTIFICATE OF CONTRIBUTIONS			
FOREIGN INVESTMENT			
PERSONAL RECEIPTS	TICK IF ATTACHED	Comments	
MEDICAL RECIEPTS - DOCTORS /PHARMACY (out of pocket)			Slips are required
DONATIONS TO REGISTERED NON- PROFIT ORGANISATIONS			NPO certificate req
EDUCATIONAL (NOT SCHOOL FEES - ONLY FOR DISABLED CHILDREN & WITH DR CERTIFICATION)			Proof required
DIVIDENDS RECEIVED			Proof required
ALL MEMBERS OF CC / DIRECTORS OF COMPANY / SOLE PROPRIETORS	IN PERSONAL CAPACITY		
MONTHLY INCOME & EXPENDITURE STATEMENT - JANUARY 2016 AND FEBRUARY 2016			SARS may call for this doc
ALL BANK STATEMENTS FOR WHOLE TAX YEAR - IF SOLE PROPRIETOR			Req for sole proprietor
STATEMENT OF ALL ASSETS AND LIABILITIES AS AT 28 FEBRUARY 2017			Compulsory
ADDITIONAL TAX INFORMATION	TICK IF ATTACHED	Comments	
TOTAL SIZE OF PROPERTY @ HOME - MUNICIPAL RATES ACC REQUIRED AS PROOF		M2	
OFFICE AT HOME -SIZE OF OFFICE		M2	
DETAILED HOME OFFICE EXPENSES (Telkom/ internet etc)			Supporting docs req
FOR EACH RENTAL OF PROPERTY - Complete a detailed schedule below as follows	No of Property?:		Supporting docs req
Description - Total rental income for the year			Supporting docs req
Detailed expenses for the year on rental property			Supporting docs req
Purchase Price + date purchased	R		Supporting docs req
Valuation of property or properties as at 28 February 2017			Supporting docs req
Date of property sale - if sold between 1 Feb 2016 to 28 Feb 2017			Supporting docs req
Selling Price of capital asset or property /properties			Supporting docs req
Capital Receipts : details of all investments purchased			Supporting docs req
Details of investments disposed of/ sold			Supporting docs req
MOTOR EXPENSES - Number of vehicles in personal name	VEHICLE 1	VEHICLE 2	VEHICLE 3
VEHICLE REGISTRATION NUMBERS (Number Plates)	GP	GP	GP
MAKE AND MODEL OF VEHICLE (Eg Opel Corsa)			
DATE ACQUIRED (Full date)			
PURCHASE PRICE OF VEHICLE (AT DATE OF PURCHASE)	ZAR	ZAR	ZAR
ODOMETER READING 1 MARCH 2016	KM	KM	KM
ODOMETER READING 28 FEBRUARY 2017	KM	KM	KM
DATE VEHICLE SOLD FOR & PRICE (Between 1 Mar 2016 - 28 Feb 2017 ONLY)	ZAR	ZAR	ZAR
VALUE AS AT 29 FEBRUARY 2016	ZAR	ZAR	ZAR
OTHER MOTOR EXPENSES	ZAR	ZAR	ZAR
MONTHLY HP / LEASE PAYMENT	ZAR	ZAR	ZAR
COPY OF HIRE PURCHASE / LEASE AGREEMENT			
TRAVEL ALLOWANCE -vehicles in personal name & shows on IRP5/ payslip			
FUEL & OIL	ZAR	ZAR	ZAR
MOTOR VEHICLE INSURANCE AND LICENCE	ZAR	ZAR	ZAR
REPAIRS AND MAINTENANCE	ZAR	ZAR	ZAR
WEAR AND TEAR	ZAR	ZAR	ZAR
PARKING	ZAR	ZAR	ZAR
LOG BOOK FROM 1 MAR 2016- 28 FEB 2017 - for travel allowance COMPULSORY REQUIREMENT	YES	YES	YES
ANNUAL TRAVEL ALLOWANCE RECEIVED	ZAR	ZAR	ZAR
COMPANY CAR	YES / NO	YES / NO	YES / NO
BUSINESS KM (FOR THE YEAR 1 MAR 2016 - 28 Feb 2017)			
PRIVATE KM (FOR THE YEAR 1 MAR 2016 - 28 Feb 2017)	KM	KM	KM
Sworn SAPS affidavit - if no income was received between 1 March 2016 - 28 February 2017		No Income - Compulsory requirement	

Together with this form , please email the applicable supporting documents to us. FULL DISCLOSURE of your tax affairs is required by Law

Please note:

- The above list is to be used as a guide and only certain items will apply to you, however if the item applies to you the documents must be forwarded to us ASAP
- The documents in the above list must be forwarded to us prior to us preparing your 2017 personal tax return
- The documents required are to be supplied before any quotation for our tax services will be issued
- The above relates to PERSONAL and not any BUSINESS matters - if you are a business owner
- If no income was received by the taxpayer during the tax year then the taxpayer must furnish us with a sworn SAPS affidavit declaring as such
- We or SARS reserve the right to request any additional documents or schedules before or after submission of your tax return (s) to ensure correctness thereof
- No tax return will be prepared or submitted to SARS should we not hold a valid SARS power of attorney that may expire before the 31 December 2016
- our contact details is taxes@shambookkeeping.co.za or Tel (011) 011 -9057 (Office number) or 076 614 4763 (No SMS - calls only)
- All tax returns must be SIGNED by the taxpayer and this **emailed back to us** BEFORE any return will be submitted to SARS. Verbal or SMS instruction is not acceptable
- We require full payment of our quote, before any preparation or submission of any tax return Payment reference is = Your Name
- A tax invoice will only be issued and submitted to the taxpayer AFTER your payment reflects in our Nedbank account + your payment has been allocated to you using your name as reference