

Information and Documentation QRH
2017 Tax Season

<p>All taxpayers</p>	<ul style="list-style-type: none"> ▪ Current residential and postal addresses. ▪ Cell number. ▪ Bank name, branch number, account type, account number. ▪ Marital status (Unmarried/Married Out-of-Community/Married In-Community). ▪ Employee tax certificate/s (IRP5's or IT3a's). ▪ Investment/deposit tax certificate/s (IT3b's or IT3c's). ▪ Medical aid tax certificate/s. ▪ Retirement Annuity Fund contribution certificates.
<p>Taxpayers claiming the section 10(1)(o)(ii) exemption for foreign remuneration:</p>	<ul style="list-style-type: none"> ▪ List of all tours starting or ending during the tax year, with dates and points of departure and arrival, cross-referenced to the passport pages containing the stamps. Please use the schedule available on the coraltax.com Downloads page. ▪ Copy of passport cover page and pages referenced per point above. ▪ Letter from employer confirming employment and tour dates. ▪ Letter from employer that splits the amounts of remuneration on the IRP5 into that earned while physically in SA and abroad. ▪ Fully signed and completed employment contract.
<p>Taxpayers who are landlords</p>	<ul style="list-style-type: none"> ▪ Schedule of rental income and expenses. Please use the schedule available on the coraltax.com Downloads page.
<p>Taxpayers claiming expenses against allowances</p>	<ul style="list-style-type: none"> ▪ List of local subsistence expenses if you are going to claim against a subsistence allowance. ▪ Cost and date of purchase of your laptop/pc if you are going to claim against this allowance.
<p>Taxpayers who sold property or non-personal use assets</p>	<ul style="list-style-type: none"> ▪ Date of sale. ▪ Cost of property (including legal and transfer fees and improvements). ▪ Proceeds of sale (less legal costs and agency fees).
<p>Private company shareholders and CC members</p>	<ul style="list-style-type: none"> ▪ The names of any private companies in which you hold shares or close corporations in which you have a member's interest. Please let me know if you received any income or distributions from these entities during the tax year.
<p>Trust beneficiaries</p>	<ul style="list-style-type: none"> ▪ Income received from a trust during the year.