

Information and Documentation QRH
2017 Tax Season

<p>1. All taxpayers</p>	<ol style="list-style-type: none"> 1. Current residential and postal addresses. 2. Cell number. 3. Bank name, branch number, account type, account number. 4. Marital status (Unmarried/Married Out-of-Community/Married In-Community). 5. Employee tax certificate/s (IRP5's or IT3a's). 6. Investment/deposit tax certificate/s (IT3b's or IT3c's). 7. Medical aid tax certificate/s. 8. Retirement Annuity Fund contribution certificates.
<p>2. Taxpayers claiming the section 10(1)(o)(ii) exemption for foreign remuneration:</p>	<ol style="list-style-type: none"> 1. List of all trips 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. 2. Copy of passport cover page and pages referenced per point above. 3. Letter from employer confirming employment and trip dates. 4. Letter from employer that splits the amounts of remuneration on the IRP5 into that earned while physically in SA and abroad. 5. Fully signed and completed employment contract.
<p>3. Taxpayers who are landlords</p>	<ol style="list-style-type: none"> 1. Schedule of rental income and expenses. Please use the schedule available on the coraltax.com Downloads page.
<p>4. Taxpayers claiming expenses against allowances</p>	<ol style="list-style-type: none"> 1. List of local subsistence expenses if you are going to claim against a subsistence allowance. 2. Cost and date of purchase of your laptop/pc if you are going to claim against this allowance.
<p>5. Taxpayers who sold property or non-personal use assets</p>	<ol style="list-style-type: none"> 1. Date of sale. 2. Cost of property (including legal and transfer fees and improvements). 3. Proceeds of sale (less legal costs and agency fees).
<p>6. Private company shareholders and CC members</p>	<ol style="list-style-type: none"> 1. 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>7. Trust beneficiaries</p>	<ol style="list-style-type: none"> 1. Income received from a trust during the year.