



## Tax documents for individuals

Please would you submit all documents relating to your income and/or expenses for the completion of your tax return:

- 1) IRP5/ IT3a from all sources of income
- 2) Medical aid contributions
- 3) Any medical expenses not paid by medical aid
- 4) Details of vehicles bought or sold during the current tax year for those who receive travel allowances include a log book clearly reflecting business and private mileage travelled.
- 5) Details of any other income, eg. investment income, interest income, any IT3b certificate income.
- 6) Details of any other expenses, eg. Retirement annuities, pension fund payments, etc.



## Tax documents for sole traders or trading persons

For those who conduct a trade or let property, we require a summary of income and expenses. Examples of expenses are:

- 1) Entertainment expenses
- 2) Motor vehicle expenses
  - a) Running costs fuel and services
  - b) Vehicle licence and insurance
  - c) Cost of vehicle and depreciation
- 3) Professional education costs
- 4) Protective clothing
- 5) Professional subscriptions
- 6) Secretarial and accounting fees
- 7) Printing, stationery and postage
- 8) Telephone expenses (land line and cellphone)
- 9) Computers repairs and maintenance



For all directors of a company, members of a close corporation or sole trader

In addition to the above, taxpayers who fall into this category would need to disclose the following financial information at 28 February 2013 on their tax returns:

### **Assets**

- Cost of vehicles
- Cost of property and buildings
- Cost of furniture
- Bank balances
- Any loans receivable
- Investment portfolios

### **Liabilities**

- Any bonds, instalment sales or finance agreements
- Any loans payable
- Any bank overdrafts
- Credit card amounts owing