

NAME AND SURNAME

SECTION A - BASIC INCOME TAX RETURN - (R300 Until 1 June 2016) R330

Were you unemployed for the full year of assessment and received no income and realised no income and realised no capital gain / loss?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you receive income that is reflected on an IRP5 or IT3(a) certificate?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
How many Certificates did you receive?		<input type="text"/>	<input type="text"/>	
Did you incur any medical expenditure (including medical scheme contributions made by you or your employer)?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you make any Retirement Annuity Fund or Income Protection contributions?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

SECTION B - ADVANCED INCOME TAX RETURN - (R500 until 1 June 2016) R550

Do you want to claim expenditure against a travel allowance?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
How many vehicles should be used in the calculation?		<input type="text"/>	<input type="text"/>	
Do you want to claim expenditure against the employer provided vehicle?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
How many vehicles should be used in the calculation?		<input type="text"/>	<input type="text"/>	
Did you receive income form foreign services rendered?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you receive income from interest (local and foreign) and/or foreign dividends?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you receive local dividend income?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Are you a director of a company or a member of a close corporation?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you receive any other income and/or incur any other allowable expenses not addressed above?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

FOREIGN INCOME

Did you receive any foreign income apart from foreign interest and foreign dividend income and excluding foreign capital gains transactions?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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CAPITAL GAIN / LOSS

Did you dispose of any local assets attracting capital gain or loss?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
How many disposals (shares to be combined as one disposal) took place?		<input type="text"/>	<input type="text"/>	
Did you dispose of any foreign assets attracting capital gain or loss?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
How many disposals (shares to be combined as one disposal) took place?		<input type="text"/>	<input type="text"/>	

PARTNERSHIPS

Are you a partner in a partnership?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
How many partnerships?		<input type="text"/>	<input type="text"/>	

LOCAL BUSINESS, TRADE AND PROFESSIONAL INCOME

Did you receive local business, trade or professional income (including rental income)?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
How many separate trading activities did you carry on?		<input type="text"/>	<input type="text"/>	

LOCAL FARMING

Did you participate in any local farming operations? Yes No

Did you participate in any farming partnership operations? Yes No

How many farming partnership operations did you participate in?

OTHER TAXABLE RECEIPTS AND ACCRUALS

Did you have any receipts and accruals not addressed by the previous questions but excluding amounts that you consider non-taxable? Yes No

AMOUNTS CONSIDERED NON-TAXABLE

Did you receive any income that you consider non-taxable? Yes No

OTHER DEDUCTIONS

Did you incur any expenditure that you wish to claim as a deduction that was not addressed by the previous questions? Yes No

SECTION C - GENERAL

Did you or your minor child make any donations during this year of assessment? Yes No

If yes, please state amount donated below

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Did you or your minor child pay donations tax on the amount donated? Yes No

Are you or your minor child beneficiaries of trust registered in or outside the Republic? Yes No

Did you claim any depreciation on an asset? Yes No

If Yes, was the asset owned by you or acquired by you as a purchaser in terms of "instalment credit agreement"? Yes No

Was the asset used for the purpose of your trade? Yes No

Did you claim any "home office expenses"? Yes No

If Yes, is your income derived mainly from commission or other variable payments based on your work performance? Yes No

Is the home office regularly and exclusively used for the purpose of your trade and is it specifically equipped for such purpose? Yes No

Are your duties mainly performed otherwise than in an office provided by your employer? Yes No

If you did not receive a travel allowance from your employer (not reflected on your IRP5) was your claim for travel expenditure based on a logbook? Yes No

D - CLIENT DISCLOSURE ACCEPTANCE

I hereby declare that the information provided by myself to TaxAssist are true and correct. I further declare that upon signature hereof I irrevocably indemnify TaxAssist against all and any claims and/or actions which may be instituted and for which TaxAssist may be liable in respect of any cause of action which may arise directly or indirectly from the information provided to TaxAssist by myself. I also declare that TaxAssist will not know of any information regarding my personal tax, should I not provide it to TaxAssist and TaxAssist will not be liable for any information not submitted as a result of me not providing TaxAssist with the relevant information.

Client signature

Client name

Date

To submit Fax: 086 672 5421 or Email: info@taxassist.co.za along with supporting documents. Once we have considered all the tax events that are related to your submission for this period, we will notify you of any additional requirements by email, SMS or contact you directly.