



AUDITING · FINANCIAL PLANNING · LEGAL COMPLIANCE

PERSONAL INCOME TAX

- Request For Information / Documentation To Prepare A Tax Return -

CLIENT INFORMATION*

Title: Initials:

First Names:

Surname:

Income Tax Number:

ID/Passport Number: Issue Date:

Passport Country:

Postal Address:

Physical Address:

Work No. Cell No.

Home No. Fax No.

E-Mail Address:

Marital Status: Not Married Married In Community Out of Community

Spouse Name and Surname:

ID/Passport Number: Issue Date:

Passport country:

BANK PARTICULARS (Kindly supply a copy of your bank statement as proof)

Bank Name:

Account Holder:

Account Number:

Branch Code:

Account Type:

***Kindly note that the information will be furnished to SARS in accordance with the Tax Administration Act.**

Were you unemployed during the year of assessment? YES NO

If yes, kindly indicate the period:

Kindly supply us with the documentation where applicable

1. INCOME

Did you receive income that is reflected on an IRP5? YES NO

How many IRP5(s) did you receive?

Did you receive income that is reflected on an IT3(a)? YES NO

How many IT3(a)(s) did you receive?