



CHECKLIST FOR INDIVIDUAL TAX PAYERS REGARDING SUPPORTING DOCUMENTS

Please ensure you have the following ready before you contact one of our branches Check to start your income tax calculation:

1. All your IRP5 certificates.
2. All your IT3 certificates.
3. All your annuity fund contribution certificates.
4. Your medical aid contribution certificate.
5. All the invoices regarding medical expenses paid by yourself.
6. Both the kilometer reading of your vehicle at 1 March 2008 and 28 February 2009.
7. Your log book for kilometers travelled is up to date until the 28 February 2009.

The following relates to more specific cases just browse through and see if it is applicable to you:

1. If you work from home all the details regarding home office expenses.
2. If you earn commission that you also supply us with details of your cell phone & entertainment expenses.
3. If you own property that you rent out you have all the information regarding the income and expenses relating to that property.
4. If you bought or sold a property you received all the necessary documents regarding the purchase or sale.
5. If you bought or sold any shares you received the necessary documents.
6. If you are a sole proprietor that you have all the information regarding income & expenditure relating to the business.