![Bespoke Financial Services logo]

Tax Declaration Information **2024** **Tax Year**

Client Name: _____   Tax Number: _____

For Office Use:			Submission Date	
Confirmation sent to client			Selected for Audit (Yes / No)	
Client Invoice	Amount	Sent	Supporting Documents Submitted (Yes / No)	

Please collate your tax certificates, receipts, tax invoices and documents for the items below. Check them off once you have the documents. This will make your tax return assessment quicker and easier.

If you are not sure of any of the items, please contact our office for assistance: (011) 646-2286.

Tax Year   2024   1 March 2023 to 29 February 2024

INCOME	QTY
IRP5 / IT3a	
Details of business income	
Trust distributions	
Details of any other income	

FOREIGN INCOME	QTY
Foreign trade / business income	
Foreign interest and dividends	
Foreign tax credits	

INVESTMENT INCOME	QTY
Interest Tax Certificates (IT3b)	
Tax free investment statements (IT3s)	
Dividend statements	
Details of foreign investment income	

DEDUCTIONS	QTY
Retirement Annuity Tax Certificate	
Medical Aid Tax Certificate	
Out of pocket medical expenses (not paid by medical aid)	

RENTAL INCOME	QTY
Rental income - local	
Rental income - offshore	

Click for Rental Income Template

TRAVEL ALLOWANCE / COMPANY CAR

Details of vehicle

Purchase contract of vehicle

Detailed log book

Click for Log Book Template

CAPITAL GAINS	QTY
Capital gains certificate (IT3c)	
Details regarding sales of any assets	
Local assets	
Foreign assets	

OTHER DEDUCTIONS	QTY
Valid S18A donations certificates (with PBO number)	
Home office expenses	

I, _____
(name of signatory), confirm the information provided above is complete and accurate.

Signed on _____ (date)

at _____ (place)

Digital Signature
OR
Signature