

Personal Income Tax 2024

Financial Year: 1 March 2023 – 29 February 2024

SUPPORTING DOCUMENTS FOR FILING

Please take note that this is a standard letter, we will require only the information that is applicable to your situation.

Documentation required to complete your return.

Supporting documents are required to complete an income tax return.

Below is a list of documentation/information that may be required:

- IRP5/IT3(a) Employees Tax Certificate (if applicable)
 - Certificates received for local interest income, foreign interest income and foreign dividend income.
 - If you are married in community of property, the certificates received by both you (the taxpayer) and your spouse are required.
 - If you married out of community of property, only the certificates that you receive are required.
 - Documents relating to medical expenditure such as:
 - The income tax certificate from your medical scheme received for the period 1 March 2023 and ending 29 February 2024 (if you belong to a medical scheme)
 - Completed ITR-DD Confirmation of [Diagnosis of Disability form](#) (if you want to claim disability related expenses). Proof of qualifying medical expenses paid by you and not recovered from a medical scheme.
 - The income tax certificate(s) received from the financial institution to which contributions for retirement annuities were made.
 - If you received a travel allowance or a fringe benefit for an employer provided vehicle, you must have a logbook to claim the business travel deductions.
 - All information relating to capital gain transactions (local and foreign)
 - Documents and receipts for commission related expenditure including a logbook to claim business travel deductions.
 - All information relating to the letting of assets.
 - Financial statements for trading and farming activities (if applicable)
 - Any other documents relating to income that must be declared or deductions that may be claimed.
- ❖ **Please send all necessary documentation to tax@riaaneksteen.co.za**
- ❖ **Please notify us if any of your personal information and contact details has changed.**