

Q-TAX & BOOKKEEPING INC

INCOME TAX CHECKLIST



1. INCOME



- IRP5 forms & certificates
- IRT3 certificates (income from investments)
- Advice of interest and dividend income earned
- Details of foreign income earned - outside of South Africa
- Rental Income Details - letting period, improvements made etc
- Capital Gains for sale of assets - house/shares in business

2. EXPENSES



- Medical Aid Certificate
 - Medical expenses not covered - invoices
 - Donations Made - certificate from the registered institution
 - Contribution Certificates - payments made toward policies
 - Travel Expense Details - log book, invoices, slips
 - Other expenses you think you can claim for
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3. OTHER

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- Marital Status
- Date Married
- Spouse's Name and ID
- Your Bank Details
- Statement Of Assets and Liabilites

This Checklist should get you started - the items listed above are general and should you wish to have a successful Income Tax submission we recommend you contact us for a more detailed checklist based on your specific requirements.

If you enjoyed this guide and you would like help structuring your taxes or to be more tax compliant why not send us an email and let's see if we can find a way to help.

Email us, hello@qtax.co.za send us some information about your tax or accounting needs and what you are looking for, we will be in touch with a quote or to setup a meeting.

At Q-Tax & Bookkeeping Inc, we provide tailored accounting and taxation solutions.

We believe tax is the enemy and the only way to win is to plan ahead, work with us to ensure you're not over paying or missing out on refunds.

We're looking forward to hearing from you.

Sincerely,

The Q-Tax Team.

