**Additional information and forms are available on our website** [**www.kironia.co.za**](http://www.kironia.co.za)

**SECTION A: PERSONAL DETAILS**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. **CONTACT INFORMATION** | | | | | | | | | | | | | | | | | | | | | | | |
| **surname and first name(s):** | | | | | | | | |  | | | | | | | | | | | | | | |
| **ID no.** | | | |  | | | | | | | | | **tax ref no:** | | | |  | | | | | | |
| **residential address** | | | | |  | | | | | | | | | | | | | | | | | | |
| **postal code:** | | | | | | | | | | | | | | | | | | | | | |  | |
| **postal address** | | | | |  | | | | | | | | | | | | | | | | | | |
| **postal code:** | | | | | | | | | | | | | | | | | | | | | |  | |
| **email:** |  | | | | | | | | | | | | | | **Cellphone** | | | | | |  | | |
| **Where you unemployed during the year?** | | | | | | **yes** | **no** | **Date(s) of unemployment** | | | | | |  | | | | | | | | | |
| **Marital Status** | | | **Not Married/Single/ Divorced/Widow/Widower** | | | | | | |  | **Married in community of property** | | | | | | |  | | **Married out of community of property** | | |  |
| **If Married in community of property** | | | | | | | | | | | | | | | | | | | | | | | |
| **spouses ID no** | |  | | | | | | | | | **spouses name(s):** | | | | |  | | | | | | | |
| **2) BANKING DETAIL** | | | | | | | | | | | | | | | | | | | | | | | |
| **Name of bank** | | | | |  | | | | | | | **account type** | | | | | | |  | | | | |
| **account no.** | | | | |  | | | | | | | **Account holder** | | | | | | |  | | | | |

**SECTION B: INCOME DECLARATION**

|  |  |  |
| --- | --- | --- |
| 1. **ADDITIONAL INCOME SOURCES** | | |
| 1. **Do you earn income from more than one source or do you earn income that is not a salary, e.g. from a trade? you may be a provisional tax payer – please see our provisional tax web page** | **yes** | **no** |
| 1. **Are you director of a company, member of a CC or trading as a sole proprietor? complete form 7** | **yes** | **no** |
| 1. **Do you earn rental income? Please complete form 6 and see our rental income web page** | **yes** | **no** |
| 1. **Do you earn investment income (e.g. interest income, dividends)?– please send us the it3(b) certificates and see our investment income web page** | **yes** | **no** |
| 1. **Have you sold trading stock, fixed property, cryptocurrency or other investments? if yes, you might be liable for capital gains tax. please send it3(c) certificate(s) and see our investment income web page** | **yes** | **no** |
| 1. **Did you receive income from a non-south-african source? please send us the details** | **yes** | **no** |
| 1. **Did you receive any other income e.g. royalties? please send us the details** | **yes** | **no** |
| 1. **Do you have a tax free savings account? Please send us your IT3(s) certificate** | **yes** | **no** |
| 1. **Did your receive other non-taxable income? this could be in the form of an inheritance, certain donations, foreign pension(s) Please send us the details and documents** | **yes** | **no** |

**SECTION C: EXPENSE CLAIMS, REFUNDS AND TAX CREDITS**

|  |  |  |
| --- | --- | --- |
| 1. **ADDITIONAL INCOME SOURCES** | | |
| 1. **Do you have a medical aid? refer to our medical aid web page and send us your medical aid certificate.** | **yes** | **no** |
| 1. **Do you want to claim additional out-of-pocket medical expense? refer to our medical aid web page.** | **yes** | **no** |
| 1. **Do you contribute to a retirement annuity? refer to our RA page and send your RA certificate (IT3(f)).** | **yes** | **no** |
| 1. **Do you contribute to a registered charity? please refer to our donations page and send certificates** | **yes** | **no** |
| 1. **Do you get a travel allowance for using your own car for business purposes? Complete form 4** | **yes** | **no** |
| 1. **Do you have use of a company vehicle? Complete form 5** | **yes** | **no** |
| 1. **Do you have a home office, earn commission income or work as a salaried contractor? Refer to home office expenses web page** | **yes** | **no** |