**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** | | | | | |  | | |
| **Marital Status** | | **Not Married/Single/ Divorced/Widow(er)** | | | |  | **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 SARS AUTO-ASSESSMENT (please see our Auto-Assessment information page)**

|  |  |  |  |
| --- | --- | --- | --- |
| SARS AUTO-ASSESSMENT OPTIONS (you **MUST** please choose the appropriate option) | | | |
| **OPT IN (fee R250)** |  | **OPT OUT (no charge)** |  |
| **We will inform you of an issued auto-assessment and give you a breakdown of the results** | | **Should SARS issue an auto-assessment, you will take full responsibility for the accuracy of the assessment.** | |

**SECTION C: INCOME DECLARATION**

|  |  |  |
| --- | --- | --- |
| **ADDITIONAL INCOME SOURCES** | | |
| 1. **Do you earn income reflected on an IRP5/IT3(a) certificate. Please send the certificate(s)** | **yes** | **no** |
| 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. **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, dividends)?– please send us the it3(b)/(s) certificates** | **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. **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 D: EXPENSE CLAIMS, REFUNDS AND TAX CREDITS**

|  |  |  |
| --- | --- | --- |
| **EXPENSE/REFUND CLAIMS** | | |
| 1. **Do you have a medical aid? please send us your medical aid certificate.** | **yes** | **no** |
| 1. **Do you want to claim additional out-of-pocket medical expenses? Due to the onerous nature of these claims, we will require all qualifying medical receipts for out-of-pocket expenses, including the amounts already reflected on the medical aid certificate as well as proof proof of payment. Our regular fees do not apply; we will provide an individualized quotation depending on the amount of work involved.** | **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 earn commission income or work as a salaried contractor? Please send details** | **yes** | **no** |