

ACCOUNT/SH

**WE DO THE BORING STUFF
SO YOU DON'T HAVE TO**

TAXGUIDE

TAXGUIDE TAXGUIDE



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WHY THIS GUIDE EXISTS



Tax season *doesn't* need to feel overwhelming.

This guide was created to help you get clear on what's expected, stay on top of deadlines, and prepare everything you need- calmly and confidently.

It's not about doing everything yourself- it's about knowing where you stand and what support you might need.



02

IMPORTANT SARS DEADLINES

**Start here to stay
ahead this tax season.**

FILING TYPE

FILING WINDOW

Auto-Assessed Taxpayers (ITA34)

7 – 20 July 2025 (Notifications)
File by 20 Oct 2025 if changes
needed

Non-Provisional Individuals (ITR12)

21 July – 20 Oct 2025

Provisional Taxpayers: 1st Return (IRP6)

Due 31 Aug 2025

Provisional Taxpayers: 2nd Return (IRP6)

Due 28 Feb 2026

Provisional Taxpayers: Full Return (ITR12)

21 July 2025 – 19 Jan 2026

Companies (ITR14)

Within 12 months after financial
year-end.

Trusts (ITR12T)

19 September 2025 – 19 Jan 2026

**Mark these dates carefully - missing a deadline
can lead to penalties and unnecessary stress.**



03 WHAT YOU'LL NEED

**Use this checklist to
gather your documents
before you file:**



GENERAL

Document / Info	<input checked="" type="checkbox"/>
South African ID or passport	<input type="checkbox"/>
Proof of residential address (not older than 3 months)	<input type="checkbox"/>
Latest bank statement (for refunds)	<input type="checkbox"/>
Updated eFiling login or confirmation of eFiling registration	<input type="checkbox"/>



INCOME

Document / Info	<input checked="" type="checkbox"/>
IRP5(s) for employment income	<input type="checkbox"/>
Freelance/self-employed income and expense records	<input type="checkbox"/>
IT3(b) Investment income certificates	<input type="checkbox"/>
Travel allowance details (if any)	<input type="checkbox"/>
Any Additional Benefits provide by employer	<input type="checkbox"/>
Rental income summary (income + expenses)	<input type="checkbox"/>
Foreign income details (salary, dividends, interest, etc.)	<input type="checkbox"/>

DEDUCTIONS & ALLOWANCES

Document / Info	<input checked="" type="checkbox"/>
Disability confirmation (if applicable)	<input type="checkbox"/>
Medical Aid Tax Certificate	<input type="checkbox"/>
Record of additional medical expenses not paid by medical aid	<input type="checkbox"/>
Retirement Annuity Certificate	<input type="checkbox"/>
Section 18A Donation Certificate	<input type="checkbox"/>
Logbook for business travel (if claiming travel expenses)	<input type="checkbox"/>
Business-related expenses with proof (invoices, receipts, etc.)	<input type="checkbox"/>
Home office exclusively used for work (floor area %, bills, etc.)	<input type="checkbox"/>



04 TIPS & TRICKS FOR TAX FILING

MAXIMISE YOUR REFUND

01.

- Claim all eligible deductions (medical aid, retirement annuities, donations)
- Keep detailed records throughout the year
- File early to avoid the last-minute rush and penalties
- Consider tax planning options if your income is complex



COMMON FILING MISTAKES TO AVOID

02.

- Forgetting to claim medical aid or retirement deductions.
- Not reporting freelance, rental, or foreign income.
- Submitting late returns or missing deadlines (penalties apply!)
- Incorrect personal or banking details
- Not keeping proper records or proof of income/deductions

PREPARING FOR NEXT YEAR: RECORD-KEEPING & PLANNING AHEAD

03.

- Keep all your documents organised throughout the year.
- Track your income and expenses regularly.
- Set reminders for important SARS dates.
- Maintain clear records of deductible expenses.
- Plan your tax payments in advance.
- Review your tax situation periodically.
- Consider using simple bookkeeping tools or apps.
- Seek professional advice early if your situation becomes complex.

05 OUR SERVICES

GETTING STARTED

- Company registration (CIPC)
- SARS tax registrations (Income Tax, VAT, UIF)
- Amendments to company details (CIPC & SARS)
- Opening a business bank account

TAX

- Individual & company tax returns (ITR12 & ITR14)
- Provisional tax submissions (IRP6)
- VAT returns
- Assistance with auto-assessments
- Managing foreign income & emigration tax compliance

ACCOUNTING & BOOKKEEPING

- Monthly bookkeeping & transaction tracking
- Bank & account reconciliations
- Financial statements
- Budgeting & forecasting
- Accounts payable & receivable management



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***WE DO THE BORING STUFF
SO YOU DON'T HAVE TO***

NEED MORE HELP?

DON'T PANIC.

**WHETHER YOU'RE UNSURE,
BUSY, OR JUST WANT PEACE
OF MIND - WE'RE HERE TO
HELP YOU DO IT RIGHT.**

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