

# ACCOUNTISH

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

## TAXGUIDE

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# 01

## 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

<b>Auto-Assessed Taxpayers (ITA34)</b>	7 – 20 July 2025 (Notifications) File by 20 Oct 2025 if changes needed
<b>Non-Provisional Individuals (ITR12)</b>	21 July – 20 Oct 2025
<b>Provisional Taxpayers: 1st Return (IRP6)</b>	Due 31 Aug 2025
<b>Provisional Taxpayers: 2nd Return (IRP6)</b>	Due 28 Feb 2026
<b>Provisional Taxpayers: Full Return (ITR12)</b>	21 July 2025 – 19 Jan 2026
<b>Companies (ITR14)</b>	Within 12 months after financial year-end.
<b>Trusts (ITR12T)</b>	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.**