

ANNUAL DECLARATION FORM
INCOME TAX RETURN 2026
 1 MARCH 2025 TO 28 FEBRUARY 2026



CLIENT DETAILS

Full Name

Surname

ID Number

Tax Reference Number

Married In Community of Property (if yes, please provide spouse details)

☐ Yes ☐ No

Email Address

Contact Number

Physical Address

Bank Account Name & Number

COMPLETE THE BELOW FIELDS AND KINDLY PROVIDE US WITH THE RELEVANT SUPPORTING DOCUMENTS

Please follow the link to download the templates: <https://www.fjmaccounts.co.za/2026Tax>

EMPLOYMENT INCOME		If yes, please provide the supporting
1. Were you employed for the full tax year?	☐ Yes ☐ No	IRP5/IT3(a)
2. Did you receive a pension/retirement annuity during the tax year?	☐ Yes ☐ No	
3. Were you unemployed for any period in the year? - If you were unemployed, provide the period of unemployment	☐ Yes ☐ No	
4. Did you earn commission which equates to more than 50% of your gross remuneration?	☐ Yes ☐ No	Commission Expense Spreadsheet
5. Are you a sole proprietor?	☐ Yes ☐ No	Income Statement Assets and Liabilities
6. Are you a member of a CC or Director of a company?	☐ Yes ☐ No	Company Name Assets and Liabilities
7. Did you receive any foreign employment income?	☐ Yes ☐ No	Passport & Payslips Foreign Income Declaration
8. Were you outside the country for 183 days and a consecutive 60 days?	☐ Yes ☐ No	

INVESTMENT INCOME		
9. Did you withdraw/ resign from, or transfer funds from a provident fund, pension fund or both during the year?	☐ Yes ☐ No	IRP5/IT3(a)
10. Did you earn any local or foreign interest on any investments or bank accounts?	☐ Yes ☐ No	IT3(b)
11. Did you earn any local or foreign dividends on any investment?	☐ Yes ☐ No	IT3(s)
12. Did you contribute to a tax-free investment?	☐ Yes ☐ No	

13. Did you receive any rental income?

☐ Yes ☐ No

- Is the property held in partnership?

☐ Yes ☐ No

- Provide the percentage of partnership

Rental Schedule

14. Did you buy/sell/transfer any crypto asset?

☐ Yes ☐ No

Crypto Spreadsheet

ADDITIONAL INCOME

15. Did you receive any other business income from carrying on a separate trade?

☐ Yes ☐ No

Income Statement

16. Are you a beneficiary for a local trust?

☐ Yes ☐ No

Trust Deed

17. Did you receive any trust distributions this tax year?

☐ Yes ☐ No

Trust Distribution
Sheet

18. Is there any income received, not mentioned above?

☐ Yes ☐ No

Detailed Explanation

PROPERTY AND OTHER CAPITAL DISPOSALS

19. Did you dispose of any local or foreign shares/assets example kruger rands?

☐ Yes ☐ No

IT3(c) / Capital Gain
Disclosure Sheet

20. Did you dispose of any local or foreign property?

☐ Yes ☐ No

21. Did you dispose of your primary residence?

☐ Yes ☐ No

- If yes, was the property held in a partnership?

☐ Yes ☐ No

- Provide the partnership split percentage

Relevant statements,
invoices and
agreements / Capital
Gain Disclosure
Sheet

DEDUCTIONS AND TAX CREDITS

MEDICAL AID - MAIN MEMBERS ONLY

22. Are you the main member of a medical aid?

☐ Yes ☐ No

Medical Aid Tax
Certificate

- Are you or any of your dependants a person with a disability?

☐ Yes ☐ No

- Has the disability been confirmed by a duly registered medical practitioner?

☐ Yes ☐ No

ITR-DD Form

- Did you incur medical expenses not covered by the medical scheme?

☐ Yes ☐ No

Medical Expense
Schedule & Detailed
Medical Aid Claim

MEDICAL AID - EXCLUDING MAIN MEMBERS

Did you pay any medical expenditure (including medical aid contributions) where you are NOT the main member of the scheme in respect of any

23. immediate family member?

☐ Yes ☐ No

Medical Aid Tax
Certificate &
Bank Statements &
Affidavit

RETIREMENT FUNDS

24. Did you contribute to a retirement fund such as pension, provident or RAF?

☐ Yes ☐ No

IT3(f)

TRAVEL ALLOWANCE AND FRINGE BENEFITS

25. Did you receive a travel allowance from your employer?

☐ Yes ☐ No

Vehicle Details &
Completed Logbook
& Fringe Benefit
Letter

26. Did you drive an employer provided vehicle during the tax year?

☐ Yes ☐ No

HOME OFFICE DEDUCTION

27. Did you spend more than 50% of your total working hours working from home? ☐ Yes ☐ No
28. Have you set aside a room to be occupied for trade?
Is your home office regularly and exclusively used for purposes of trade and
29. specifically equipped for that purpose ☐ Yes ☐ No
30. Have you incurred home office expenses? ☐ Yes ☐ No

Home Office
Deduction Schedule
& Supporting
Documents

DONATIONS

31. Did you make any donations to an approved S18A organisation? ☐ Yes ☐ No

Donation Certificate

ANY OTHER DECLARATIONS

- Any other declarations to be made to SARS not covered above? Please provide
32. details ☐ Yes ☐ No

SIGNATURE

I, _____ HEREBY DECLARE THAT THE ABOVE DECLARATION IS TRUE AND CORRECT.
SIGNED AT _____ ON _____

If you signed above, you agree to the FJM Mandate and Terms and Conditions. Please follow this link for more information,
<https://www.fjmaccounts.co.za/ind-mandate>, or send us an email at admin@fjmaccounts.co.za.

The contents of this form will remain confidential and will only be used by the Company to ensure compliance with the Income Tax Act 58 of 1962. The details on this form will only be for the use of providing information to the South African Revenue Service and to enable the Company to liaise with you regarding completion & submission of the necessary income tax details as provided by you. The Company takes all necessary precaution to ensure compliance with the Protection of Personal Information Act 4 of 2013.