

ANNUAL DECLARATION FORM

INCOME TAX RETURN 2025

1 MARCH 2024 TO 28 FEBRUARY 2025



CLIENT DETAILS

Full Name

Surname

ID Number

Tax Reference Number

Married In Community of Property

☐ YES ☐ NO

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

EMPLOYMENT INCOME

1. Were you employed for the full tax year? ☐ YES ☐ NO
2. Were you unemployed for any period in the year?
- If you were unemployed, provide the period of unemployment.
3. Did you earn commission which equates to more than 50% of your gross remuneration? ☐ YES ☐ NO
4. Are you a sole proprietor? ☐ YES ☐ NO
5. Are you a member of a CC or Director of a company? ☐ YES ☐ NO

IRP5/IT3(a) & Commission
Related Expenses

Income Statement

Company Name

INVESTMENT INCOME

6. Did you resign from or transfer funds from a provident fund, pension fund or both during the year? ☐ YES ☐ NO
7. Did you earn any local or foreign interest on any investments or bank accounts? ☐ YES ☐ NO
8. Did you earn any local or foreign dividends on any investment? ☐ YES ☐ NO
9. Did you receive any rental income?
- Is the property held in partnership? ☐ YES ☐ NO
- Provide the percentage of partnership %

IRP5

IT3(b)

Rental Schedule

DEDUCTIONS AND TAX CREDITS

MEDICAL AID - MAIN MEMBERS ONLY

10. Are you the main member of a medical aid?
- 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
- Did you incur medical expenses not covered by the medical scheme? ☐ YES ☐ NO

Medical Aid Tax Certificate

ITR-DD Form

Medical Expense Schedule

MEDICAL AID - EXCLUDING MAIN MEMBERS

11. Did you pay any medical expenditure (including medical aid contributions) where you are NOT the main member of the scheme in respect of any immediate family member? ☐ YES ☐ NO

Main Member Medical Aid
Tax Certificate

RETIREMENT FUNDS

12. Did you contribute to a retirement fund such as pension, provident or RAF? ☐ YES ☐ NO

IT3(f)

TRAVEL ALLOWANCE AND FRINGE BENEFITS

13. Did you receive a travel allowance from your employer?
14. Did you drive an employer provided vehicle during the tax year?

☐ YES ☐ NO
☐ YES ☐ NO

Vehicle Details & Completed
Logbook

HOME OFFICE DEDUCTION

15. Did you spend more than 50% of your total working hours working from home?
16. Have you set aside a room to be occupied for trade?
17. Is your home office regularly and exclusively used for purposes of trade and specifically equipped for that purpose?
18. Have you incurred home office expenses?
19. Have you kept records of all home office expenses?

☐ YES ☐ NO
☐ YES ☐ NO
☐ YES ☐ NO
☐ YES ☐ NO
☐ YES ☐ NO

Home Office Deduction
Schedule

DONATIONS

20. Did you make any donations to a approved S18A organisation?

☐ YES ☐ NO

S18A Certificate

PROPERTY AND OTHER CAPITAL DISPOSALS

21. Did you dispose of any local or foreign shares?
22. Did you dispose of any local or foreign property?
23. Did you dispose of your primary residence?
- If yes, was the property held in a partnership?
- Provide the partnership split percentage

☐ YES ☐ NO
☐ YES ☐ NO
☐ YES ☐ NO
☐ YES ☐ NO
 %

IT3(c)

Relevant statements,
invoices and agreements

ADDITIONAL INCOME

24. Did you receive any other business income from carrying on a separate trade?
25. Did you receive any other income not covered above?
26. If other income was received not covered above, provide a description.

☐ YES ☐ NO
☐ YES ☐ NO

Income Statement

DECLARATION

I, HEREBY DECLARE THAT THE ABOVE DECLARATION IS TRUE AND CORRECT.

SIGNED AT ON THE DAY OF 20 .

SIGNATURE

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.