



INFORMATION TO CREATE YOUR PERSONAL INCOME TAX RETURN

This page allows you to personalise your ITR12 return in order to accommodate your individual tax requirements.

ITR12

Standard

Is this declaration made by a Tax Practitioner? Y [ ] N [ ]
Mark with an "X" if you ceased to be a resident of the RSA during this year of assessment. [ ]
Please state the date on which you ceased to be a resident: (CCYYMMDD) [ ][ ][ ][ ][ ][ ][ ][ ]8
Were you unemployed for the full year of assessment and did not receive any income including any capital gain/loss? Y [ ] N [ ]
Did you make any retirement annuity fund contributions? Y [ ] N [ ]
Were you unemployed for any period during this year of assessment? Y [ ] N [ ]
For how many periods were you unemployed? [ ][ ]
Did you receive income that is reflected on an IRP5 or IT3(a) certificate? Y [ ] N [ ]
How many certificates did you receive? [ ][ ]
Did you pay any medical expenditure (including medical scheme contributions made by you or your employer towards a medical scheme where you are the principal / main member)? Y [ ] N [ ]
Did you pay any medical expenditure (including medical scheme contributions where you are not the principal / main member of the medical scheme) in respect of any immediate family member who is dependent on you for family care and support? Y [ ] N [ ]
Did you or your employer make any retirement annuity fund contributions for the benefit of yourself? Y [ ] N [ ]
Do you want to claim a deduction against a travel allowance? Y [ ] N [ ]
How many vehicles should be used in the calculation? [ ][ ]
Do you want to claim a deduction against an employer provided vehicles? Y [ ] N [ ]
Specify the number of vehicles acquired by the employer by means of:
An operating lease [ ][ ]2
Any method other than an operating lease [ ][ ]2
Did you receive any form of remuneration for foreign services rendered? Y [ ] N [ ]

Did you receive interest (local and foreign), distributions from a Real Estate Investment Trust (REIT), taxable foreign dividends and / or dividends deemed to be income in terms of section s8E & s8EA? (Excluding amounts received as a beneficiary of a trust(s), or deemed to have accrued in terms of s7) Y [ ] N [ ]
Did you receive exempt local and/or foreign dividend income? Y [ ] N [ ]
Was any income distributed to you / vested in you as a beneficiary of a trust, or deemed to have accrued in terms of s7? Y [ ] N [ ]
Indicate the number of trust(s) applicable? [ ][ ]2
Were there any transactions (contributions, transfers, withdrawals, income received/accrued) on any Tax Free Investments held by you during this year of assessment? Y [ ] N [ ]
Did you derive income from the letting of fixed property(ies)?(Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7) Y [ ] N [ ]
From how many separate rental activities did you derive income? [ ][ ]2
Are you a director of a company or a member of a close corporation? Y [ ] N [ ]
Does any declaration in this return relate to an application made under the SARS Voluntary Disclosure Programme? Y [ ] N [ ]
Do you want to claim donations made to approved organisation(s) in terms of s18A? Y [ ] N [ ]
How many organisations did you donate to? [ ][ ]2
Did you receive any other income (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7) and/or incur any other allowable expenses not addressed above? Y [ ] N [ ]
Foreign Income (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)
Did you receive any foreign income apart from foreign interest and foreign dividend income and excluding foreign capital gain transactions? Y [ ] N [ ]
Capital Gain / Loss (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)
Did you dispose of any local assets attracting capital gain or loss? Y [ ] N [ ]
How many disposals (shares to be combined as one disposal) took place? [ ][ ]2
Did you dispose of any foreign assets attracting capital gain or loss? Y [ ] N [ ]
How many disposals (shares to be combined as one disposal) took place? [ ][ ]

Partnerships

Are you a partner in a partnership(s)? Y [ ] N [ ]
How many partnership(s)? [ ][ ]2

Local Business, Trade and Professional Income (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)

Did you derive income from local business, trade or profession other than rental income from the letting of fixed property(ies)? Y [ ] N [ ]
How many separate trading activities did you carry on? [ ][ ]2

Local Farming

Did you participate in any local farming operations? Y [ ] N [ ]
Did you participate in any farming partnership operations? Y [ ] N [ ]
How many farming partnership operations did you participate in? [ ][ ]2

Other Taxable Receipts and Accruals (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)

Did you have any receipts and accruals not addressed by the previous questions but excluding amounts that you consider non-taxable? Y [ ] N [ ]

Foreign Tax Credits - s6quin <OR> Foreign Tax Refunded / Discharged

Were any foreign tax credits refunded/discharged during the year of assessment for which a rebate/deduction was allowed during a previous year of assessment? Y [ ] N [ ]

Amounts Considered Non-Taxable (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)

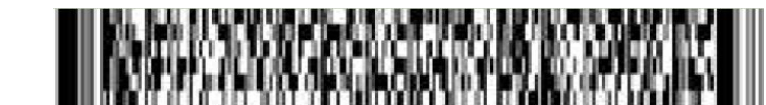
Did you receive any income that you consider non-taxable? Y [ ] N [ ]

Medical Expenditure

Did you pay any medical expenditure (including medical scheme contributions made by you or your employer towards a medical scheme where you are the principal / main member)? Y [ ] N [ ]
Did you pay any medical expenditure (including medical scheme contributions where you are not the principal / main member of the medical scheme) in respect of any immediate family member who is dependent on you for family care and support? Y [ ] N [ ]

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Y XXXX





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Retirement Annuity Fund Contributions

Did you or a deemed employer (partnership) make any retirement annuity fund contributions for the benefit of yourself? Y  N

Venture Capital Company Investments

Did you invest in SARS approved Venture Capital Companies in exchange for shares during this year of assessment? Y  N

Specify the number of investments made in SARS approved Venture Capital Companies

Were any SARS approved Venture Capital Company shares sold during the year of assessment for which a tax deduction was allowed? Y  N

Other Deductions

Did you incur any expenditure that you wish to claim as a deduction that was not addressed by the previous questions? Y  N

EXAMPLE

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Y XXXX



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Bank Account Holder Declaration

I use South African bank accounts  I use a South African Bank Account of a 3rd party  I declare that I have no South African bank account

Reason for No Local / 3rd Party Bank Account

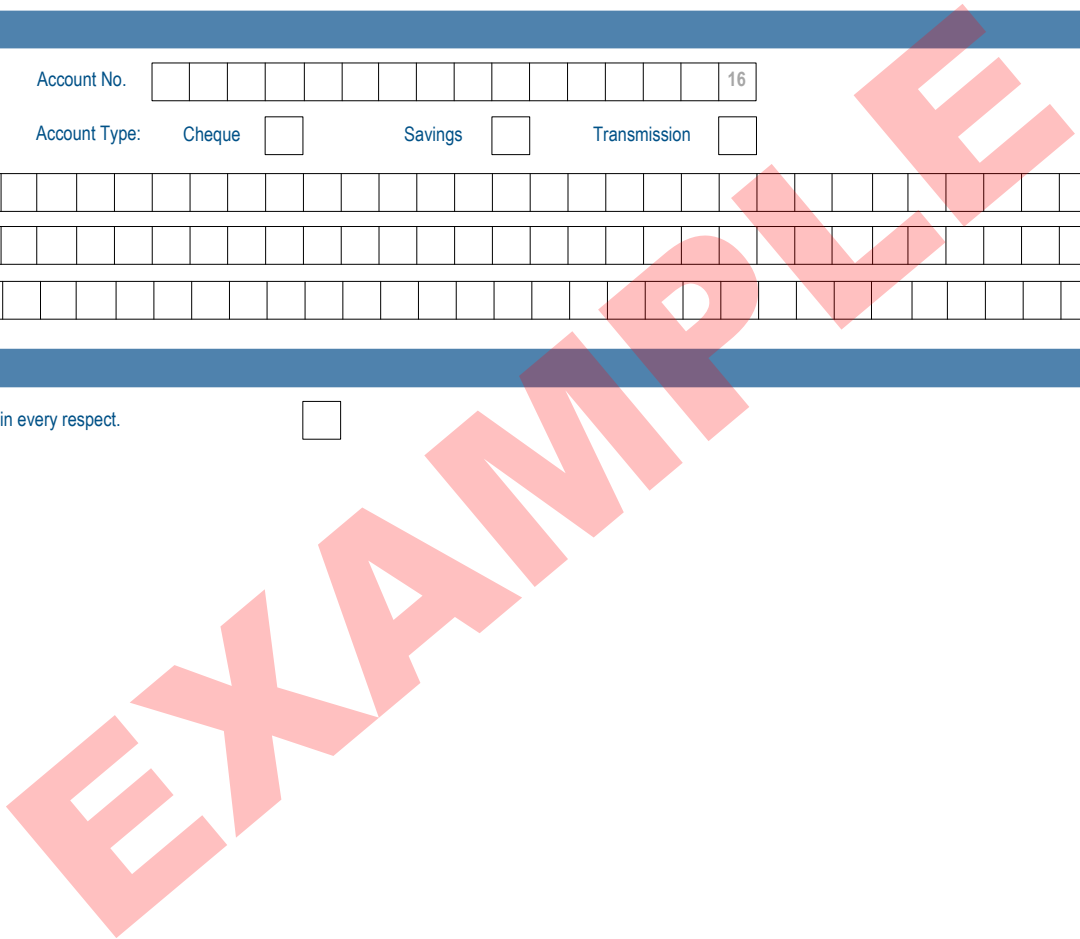
Non-resident without a local bank account  Insolvency / Curatorship  Deceased Estate  Shared Account  Income below tax threshold / Impractical  Statutory restrictions  Minor child

Bank Account Details

Bank Account Status [grid] 10 Account No. [grid] 16 Branch No. [grid] 6 Account Type: Cheque [input] Savings [input] Transmission [input] Bank Name [grid] 50 Branch Name [grid] 50 Account Holder Name (Account name as registered at bank) [grid] 49

Agreement Statement

Mark here with an 'X' if you do declare that this information is true and correct in every respect.



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Y XXXX



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Trust Income – Income distributed to you / vested in you as a beneficiary of a trust or deemed to have accrued in terms of s7

Trust Name

Trust Registration Number

Trust Tax Reference Number 10

Details of local income

Local Remuneration R

Local Annuities R

Local Interest R 4201

Distributions from Real Estate Investment Trust/s (REIT) R 4238

Local Capital Gain / Loss R

Local Rental Income from the letting of fixed property(ies) R 4210

Dividends deemed to be income in terms of s8E and s8EA R 4292

Local Business and Trading Income (excluding Rental Income from letting of fixed property(ies) and income from Farming Operations) R

Income from Local Farming Operations (IT48) R

Details of local income (continue)

Deemed Annuity R 3611

Other Local Income R

Details of foreign income

Foreign Interest R 4218

Foreign tax credits on foreign interest R 4113

Foreign Dividends R 4216

Foreign tax credits on foreign dividends R 4112

Foreign Capital Gain / Loss R

Foreign tax credit i.r.o. capital gain / loss R 4114

Foreign Farming R 0192

Foreign tax credits on foreign farming income R 4119

Other Foreign Income R 4220

Foreign tax credits on other foreign income R 4110

Amount Considered Non-Taxable

Amount R

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Y XXXX



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**Capital Gain / Loss** (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)

Note: The annual exclusion and inclusion rate and carry forward losses will be calculated by SARS.

**Determination of Local Gain / Loss**

- Rands only, no cents

Does the transaction relate to a primary residence? Y  N

If Yes, indicate whether the primary residence is held jointly? Y  N

Is the primary residence held in a partnership? Y  N

If Yes, state the percentage held  ,  %

Mark here with an 'X' to confirm that the full amounts relating to proceeds and base cost of the primary residence are declared.

Does any exemption/rollover other than primary residence exemption apply to this transaction? Y  N

Proceeds  
R

Base Cost  
R

Primary Residence and Other Exclusions (excl. annual exclusions)  
R

Gain  
R

Or Loss  
R

4250

4251

**Determination of Foreign Gain / Loss** - Rands only, unless cents specified (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)

Does the transaction relate to a primary residence? Y  N

If Yes, indicate whether the primary residence is held jointly? Y  N

Is the primary residence held in a partnership? Y  N

If Yes, state the percentage held  ,  %

Mark here with an 'X' to confirm that the full amounts relating to proceeds and base cost of the primary residence are declared.

Does any exemption/rollover other than primary residence exemption apply to this transaction? Y  N

Proceeds  
R

Base Cost  
R

Primary Residence and Other Exclusions (excl. annual exclusions)  
R

Gain  
R

Or Loss  
R

Foreign Tax Credits in respect of Foreign Capital Gain/Loss  
R

4252

4253

4114

**Local Rental Income from the Letting of Fixed Property(ies)** (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)

Note: If in a partnership, declare full partnership financial details. Should you have incurred expenditure for your own account relating to the partnership and which is not reflected in the financial statements of the partnership, such expenditure should be claimed under "Other Deductions".

**Local Rental Income from the Letting of Fixed Property(ies)** (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7) (continue)

Description

Note: Where a unique identifier was allocated to this trade in the previous year, please complete that allocated number. Also ensure that the description above is the same as the previous year.

Unique Identifier

**Income - Rands only, no cents**

Rental Income  
R

**Expenditure - Rands only, no cents**

Accounting Fees  
R

Agency Fees  
R

Bad Debts  
R

Depreciation  
R

Electricity / Rates and Taxes  
R

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Y XXXX



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Expenditure – Rands only, no cents (continued)

Insurance  
R

Interest / Finance Charges  
R

Levies Paid  
R

Repairs / Maintenance  
R

Other  
R

Description

TOTAL  
R

Determination of Profit / Loss – Rands only, no cents

Taxable Profit  
R  4210

Taxable Loss  
R  4211

Should the loss incurred be excluded (ring-fenced) for the calculation of your tax liability? Y  N

Are you in a partnership? Y  N

If YES  State the profit / loss percentage OR  ,  %

Mark here with an "X" if variable ratios should be applied for the sharing of income and/or expenses.

Local Business, Trade and Professional Income (other than Rental Income from the Letting of Fixed Property(ies) and distributions received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)

Note: If in a partnership, declare full partnership financial details. Should you have incurred expenditure for your own account relating to the partnership and which is not reflected in the financial statements of the partnership, such expenditure should be claimed under "Other Deductions".

Description

Note: Where a unique identifier was allocated to this trade in the previous year, please complete that allocated number. Also ensure that the description above is the same as the previous year.

Unique Identifier

Income – Rands only, no cents

Turnover / Sales  
R

Income Reflected on an IRP5/IT3(a) regarded to be Trading Income  
R

Cost of Sales  
R

Gross Profit

R

Gross Loss

R

Income – Rands only, no cents (continued)

Income Other Than Turnover  
R

Description Relating to Other

TOTAL  
R

Expenditure – Rands only, no cents

Accounting Fees  
R

Administration Cost  
R

Bad Debts  
R

Bank Charges  
R

Capital Allowances  
R

Commission paid  
R

Consulting Fees Paid  
R

Depreciation  
R

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Y XXXX



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**Expenditure – Rands only, no cents (continued)**

Electricity / Rates and Taxes  
R

Entertainment  
R

Insurance  
R

Interest / Finance Charges  
R

Lease Payment  
R

Legal Costs  
R

Provision for Doubtful Debts  
R

Rental Paid  
R

Repairs / Maintenance  
R

Royalties and License Fees  
R

Salaries and Wages  
R

Telephone  
R

Travel Costs – Local  
R

Travel Costs – Foreign  
R

**Expenditure – Rands only, no cents (Continued)**

Other  
R

Description Relating to Other

**TOTAL**

R

**Accounting Profit**

R

**Accounting Loss**

R

**Adjustments: Add Back – Rands only, no cents**

Depreciation  
R

Disallowable Foreign Expenses  
R

Donations  
R

Doubtful Debts  
R

Finance Charges  
R

**Adjustments: Add Back – Rands only, no cents (Continued)**

Legal Costs  
R

Private / Personal Expenses  
R

Provisions  
R

Recoupment  
R

Unproductive Interest  
R

Other  
R

Description Relating to Other

**TOTAL**

R

**Adjustments: Allowable – Rands only, no cents**

UDZ (s 13quat) – improvements allowable in respect of this year  
R

UDZ (s 13quat) – erection/acquisition of a new building allowable in respect of this year  
R

Other deductions in respect of Buildings – excluding s 13quat  
R

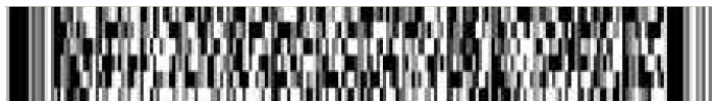
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Y XXXX



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**Additional Information**

**UDZ (s 13quat)**

Total cost incurred in respect of erection/acquisition or improvements of a building

R

**Improvements not owned by taxpayer – s12N**

Did you claim any deduction as a deemed owner in terms of s12N? Y  N

**Other Taxable Receipts and Accruals**

– Rands only, no cents (Excluding amounts received / accrued as a beneficiary of a trust/s, or deemed to have accrued in terms of s7)

Note: Use this section to declare any amounts that have not been addressed by previous sections.

Remuneration from Foreign employer for services rendered in SA

R  4236

Royalties – Profit

R  4212

Royalties – Loss

R  4213

Other

R  4214

Description Relating to Other

Amounts Received/Accrued Considered **Non - Taxable** – Rands only, no cents(Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)

Amounts accrued to you as an exclusive deemed resident of another country in terms of a double taxation agreement between RSA and that other country

R

Exempt Amount in terms of s10(1)(o)

R

Donations

R

Exempt Local and Foreign Dividends

R

Interest earned by a non-resident in terms of s10(1)(h)

R

Inheritances

R

Foreign Pension

R

Other

R

Description Relating to Other

**Tax Free Investments (TFI) – Rands only, no cents**

Contributions made to a TFI during the year of assessment

R  4219

Amounts transferred from a TFI to another during the year of assessment

R  4246

**Tax Free Investments (TFI) – Rands only, no cents (continued)**

Amounts transferred out of a TFI during the year of assessment

R  4247

Amounts withdrawn out of a TFI during the year of assessment

R  4248

Net return on Investment - Profit

R  4239

Net return on Investment - Loss

R  4240

Interest

R  4241

Dividends

R  4242

Capital Gain

R  4243

Capital Loss

R  4244

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Y XXXX



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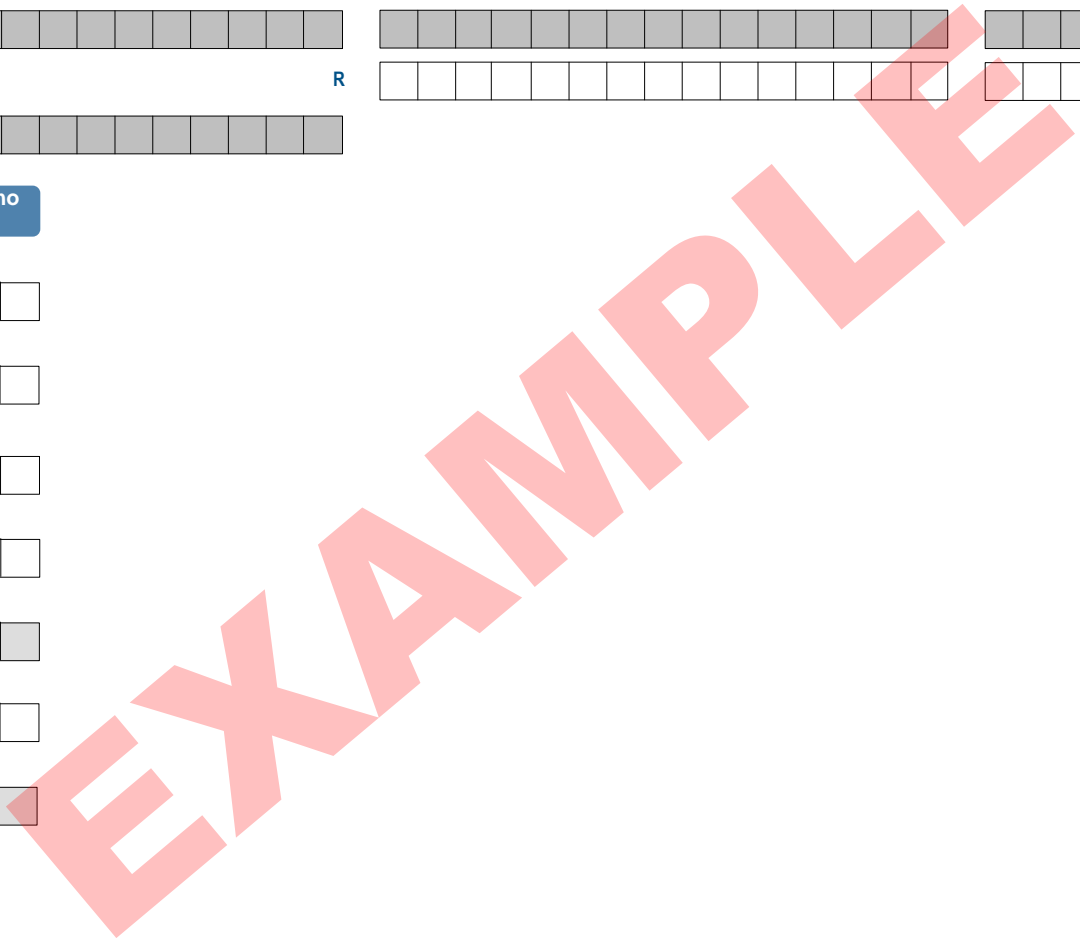


Special Depreciation Information - Rands only, no cents

		Current Year	Subsequent Year	Year Following Subsequent Year
Balance b/f previous year	R	<input type="text"/>	<input type="text"/>	
Purchases current year	R	<input type="text"/>		
Deductions in respect of purchases current year	R	<input type="text"/>	<input type="text"/>	<input type="text"/>
Deductions added back in respect of assets sold	R		<input type="text"/>	<input type="text"/>
Amount allowable current year	R	<input type="text"/>		

Information on Capital Improvements - Rands only, no cents

Balance brought forward from previous year	R	<input type="text"/>
Less: Recoupments	R	<input type="text"/>
Plus: Purchases/costs - current year	R	<input type="text"/>
Plus: Total brought forward from partnership IT48V's	R	<input type="text"/>
<b>Total improvements</b>	R	<input type="text"/>
Less: Allowable deductions current year	R	<input type="text"/>
<b>Balance carried forward to subsequent year</b>	R	<input type="text"/>



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NO XXXXXXXXXXXX

P XXXXXX

Y XXXX



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EXAMPLE







Income from Local Partnership Farming Operations (IT48V) – Rands only, no cents

Partnership name [Grid]

Gross receipts and accruals (Including private usage)

R [Grid]

Plus: Livestock on hand at the end of the current year of assessment

R [Grid]

Plus: Produce on hand at the end of the current year of assessment

R [Grid]

Excluding market value of livestock and produce acquired otherwise than by purchase, natural increase or in the ordinary course of farming operations (e.g. donations and inheritance)

Sub-Total (i)

R [Grid]

Livestock on hand at the end of the preceding year of assessment

R [Grid]

Livestock purchased and received in exchange

R [Grid]

Balance of livestock not allowed in the preceding year of assessment

R [Grid]

Sub-Total (ii)

R [Grid]

Less: Amount deducted [Sub-Total (ii) limited to Sub-Total (i)]

R [Grid]

R [Grid]

Less: Balance carried forward to the following year of assessment (This amount may not create or increase a loss)

R [Grid]

Sub-Total

R [Grid]

Less: Allowable Expenses

R [Grid]

Less: Produce on hand at the end of the preceding year of assessment

R [Grid]

Less: Special depreciation

R [Grid]

R [Grid]

Net Profit / Loss Partnerships

R [Grid]

Your share % of Taxable Income / Loss from partnership farming operations

R [Grid]

(Carry this amount forward to your personal IT48)

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NO XXXXXXXXXXXX

P XXXXXX

Y XXXX



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EXAMPLE

**Special Depreciation Information - Rands only, no cents**

	Current Year	Subsequent Year	Year Following Subsequent Year
Balance b/f previous year	R <input type="text"/>	<input type="text"/>	
Purchases current year	R <input type="text"/>		
Deductions in respect of purchases current year	R <input type="text"/>	<input type="text"/>	<input type="text"/>
Deductions added back in respect of assets sold		R <input type="text"/>	<input type="text"/>
Amount allowable current year	R <input type="text"/>		

**Information on Capital Improvements (Rands only, no cents)**

Purchases/costs - current year  
 R  Note: Reflect your % share of this amount on the IT48.

**Partner's Information for Share Distribution (Farming)**

Surname / Trading Name	<input type="text"/>	Income Tax Ref No.	<input type="text"/>
Initials (if applicable)	Share % <input type="text"/> , <input type="text"/> %	Profit / Loss R	<input type="text"/>
		Improvements R	<input type="text"/>
Surname / Trading Name	<input type="text"/>	Income Tax Ref No.	<input type="text"/>
Initials (if applicable)	Share % <input type="text"/> , <input type="text"/> %	Profit / Loss R	<input type="text"/>
		Improvements R	<input type="text"/>
Surname / Trading Name	<input type="text"/>	Income Tax Ref No.	<input type="text"/>
Initials (if applicable)	Share % <input type="text"/> , <input type="text"/> %	Profit / Loss R	<input type="text"/>
		Improvements R	<input type="text"/>
Surname / Trading Name	<input type="text"/>	Income Tax Ref No.	<input type="text"/>
Initials (if applicable)	Share % <input type="text"/> , <input type="text"/> %	Profit / Loss R	<input type="text"/>
		Improvements R	<input type="text"/>

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P XXXXXX

Y XXXX



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**Details of Farming Expenses (IT48V) (continued)**

**Adjustments: Add back (continued)**

Other

R

Please provide a description relating to other expenses indicated above

**Total Adjustments: Add back**

R

**Total Allowable Expenses**

**Total**

R

**Capital Improvements Incurred during the Year of Assessment (paragraph 12(1) of the First Schedule)**

Dipping tanks

R

Dams, irrigation schemes, boreholes and pumping plants

R

Fences

R

Erection of, or additions or improvements to farm buildings (other than buildings used for domestic purposes)

R

Planting of trees, shrubs or perennial plants for the production of grapes or other fruit, nuts, tea, coffee, hops, sugar, vegetable oils or fibres and the establishment of an area for such purposes

R

Building of roads and bridges used in farming operations

R

Carrying of electric power from the main transmission lines to the farm apparatus or under an agreement concluded with the Electricity Supply Commission as stipulated

R

Wages paid to employees employed in construction of capital works as set out above

R

**Total Purchases/Costs – Current year**

**Total**

R

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P XXXXXX

Y XXXX



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Taxpayer Information – Deductions

Medical Deductions – Rands only, no cents

Medical expenditure (including medical scheme contributions made by you or your employer towards a medical scheme where you are the principal / main member)

Were you the principal / main member of a medical scheme to which you and/or your employer made contributions? Y N

In how many medical scheme(s) were you the principal / main member during this year of assessment 2

Details of Medical Scheme

Medical Scheme Name:

Medical Scheme Name input field

Medical Scheme Membership Number

Medical Scheme Membership Number input field

State the total number of dependants (including yourself) per month:

Grid for dependants per month (Mar to Feb)

State the Medical contributions made by yourself and / or your employer to this scheme.

R 4005

State any medical expenses paid by you that was claimed from your medical scheme and reflected on the medical certificate. (other than physical impairment or disability expenses)

R 4020

Medical expenditure (including medical scheme contributions where you are not the principal / main member of the medical scheme) in respect of any immediate family member who is dependent on you for family care and support

Were any of the immediate family member(s) dependant(s) of a medical scheme(s) to which you paid the contributions? Y N

Indicate the number of medical schemes to which you paid the contributions in respect of such dependant(s) 2

Details of Medical Scheme

Medical Scheme Name:

Medical Scheme Name input field

Medical Scheme Membership Number

Medical Scheme Membership Number input field

State the total number of dependants per month:

Grid for dependants per month (Mar to Feb)

State the total amount of medical scheme contributions paid on behalf of any immediate family member(s) who is dependent on you for family care and support

R 4005

State the amount of the medical expenses paid by you that was claimed from the medical scheme and reflected on the medical certificate (other than physical impairment or disability expenses)

R 4020

Expenses not reflected on any medical certificate

State any qualifying medical expenses paid by you not claimed from any medical scheme and not reflected on any medical scheme certificate (other than physical impairment or disability expenses)

R 4034

Physical Impairment

State any qualifying physical impairment expenses paid by you and not recovered from any medical scheme(s) and not included above.

R 4022

Disability

Are you, your spouse or any of your qualifying children a person with a disability? Y N

If 'Yes', has the disability been confirmed by a duly registered medical practitioner as prescribed? Y N

Indicate the number of qualifying person(s) with a disability: 2

Details of Disability

Indicate the person with the disability with an "X" below:

Yourself Spouse Qualifying Child

Date of birth of person with disability (CCYYMMDD)

Indicate the severity of the disability with an "X" below:

Moderate Disability Severe Disability

Specify the date on which the latest ITR-DD for this person was confirmed by a duly registered practitioner (CCYYMMDD)

Registered Medical Practitioner Practice Number 15

State the qualifying disability expenses paid by you i.r.o yourself, your spouse and qualifying children and not recovered from any medical scheme and not included in any expenses claimed above

R 4023

Retirement Annuity Fund Contributions – Rands only, no cents

Total contributions for this year of assessment R 4006

To how many Retirement Annuity policy(ies) did you contribute during this year of assessment? 2

Details of Policy(ies)

Name of Insurer

Policy Number

Contributions made to this policy R

Travel Claim Against Allowance – Rands only, no cents

Did you use a logbook to determine your business km travelled? Y N

Indicate with an 'X' below whether the vehicle was acquired by way of:

Purchase Agreement Lease Agreement

Vehicle Registration No.

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NO XXXXXXXXXXXX

P XXXXXXX

Y XXXX



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Taxpayer Information – Deductions(Continue)

Car Make

Car Model

Date of Purchase (CCYYMMDD) Cost Price or Cash Value R

Details of Kilometres Travelled

Starting Date (CCYYMMDD)

Closing Date (CCYYMMDD)

Opening Kilometres

Closing Kilometres

Total Kilometres

Business Kilometres

Where Records of Actual Expenditure Were Kept

Fuel and Oil R

Maintenance and Repairs R

Insurance and License Fees R

Wear and Tear R

Or Lease Payment R

Finance Charges R

Other R

Employer Provided Vehicle: Other than an Operating Lease – Rands only, no cents

Did you use a logbook to determine your business km travelled? Y N

Vehicle Registration No.

Car Make

Car Model

Year Manufactured Cost Price or Cash Value R

Fringe Benefit Value R

Details of Kilometres Travelled

Starting Date (CCYYMMDD)

Closing Date (CCYYMMDD)

Opening Kilometres

Closing Kilometres

Total Kilometres

Business Kilometres

Full Cost Incurred by the Employee (No reimbursement by the Employer)

Were you fully or partially reimbursed by your employer in respect of the following expenses?

Insurance Y N R

License Fees Y N R

Maintenance Y N R

Fuel Y N

Was a maintenance plan included in the cost price or cash value of the vehicle provided by your employer? Y N

Employer Provided Vehicle: Operating Lease – Rands only, no cents

Did you use a logbook to determine your business km travelled? Y N

Vehicle Registration No.

Fringe Benefit Value R

Details of Kilometers Travelled

Starting Date (CCYYMMDD)

Closing Date (CCYYMMDD)

Opening Kilometres

Closing Kilometres

Total Kilometres

Business Kilometres

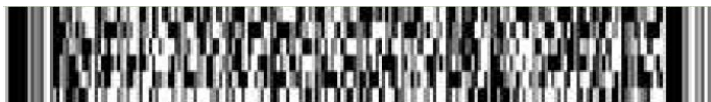
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NO XXXXXXXXXXXX

P XXXXXX

Y XXXX



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**Taxpayer Information – Deductions (Continue)**

**Donations allowable in terms of s18A to approved organisations – Rands only, no cents**

Total amount donated during the year of assessment

R  4011

**Complete the details of the organisation(s) to whom donations were made:**

**Complete the details of the 10 organisations to whom donations with the highest monetary value were made:**

PBO number  13

Amount donated to this organisation

R

**Other Deductions – Rands only, no cents**

Expenses against local taxable subsistence allowance

R  4017

Expenses against foreign taxable subsistence allowance

R  4019

Donations allowable in terms of s18A to approved public benefit organisations

R  4011

Depreciation

R  4027

Home Office Expenses

R  4028

Travel Expenses (no allowance - commission income)

R  4015

**Other Deductions – Rands only, no cents**

Amounts Refunded in terms of s11(nA) and 11(nB)

R  4042

Allowable Accountancy / Administration Expense

R  4043

Legal expenses in terms of s11(c)

R  4044

Bad debt/Provision for doubtful debt

R  4045

Use of motor vehicle

R  4046

Section 8C losses

R  4031

Holders of Public Office: Deduction in terms of s 8(1)(d)

R  4047

Remuneration taxed on IRP5 but comply with exemption in terms of s10(1)(o)(i)

R  4033

Remuneration taxed on IRP5 but comply with exemption in terms of s10(1)(o)(ii) (excluding s 8A/8C gains and dividends)

R  4041

Remuneration (s 8A/8C gains) taxed on IRP5 but comply with exemption in terms of s10(1)(o)(ii). (This amount is restricted to s 8A/8C gains, excluding dividends)

R  4032

Other

R  4016

Description Relating to Other

**Qualifying criteria for s10(1)(o)(i)**

Are you a SA resident as defined in the Income Tax Act? Y  N

Were you employed as an officer or crew member to render services on a ship outside SA? Y  N

If yes, please state the total number of full days you were outside SA to render services during this year of assessment  3

Remuneration received/acrued in respect of foreign services rendered

R

**Qualifying criteria for s10(1)(o)(ii) exemption ( excluding s8A/8C gains and dividends)**

Are you a SA resident as defined in the Income Tax Act? Y  N

Were you employed to render services outside SA? Y  N

If yes, please state the number of days you were outside SA during any 12 month qualifying period:

Start date of the 12 month qualifying period (CCYYMMDD)  8

End date of the 12 month qualifying period (CCYYMMDD)  8

Total number of full days outside SA during the 12 month qualifying period  3

Did you within the period indicated above spend a continuous period exceeding 60 full days outside SA? Y  N

Total number of work days during the above qualifying period relating to this year of assessment  3

Total number of work days outside South Africa during the above qualifying period relating to this year of assessment.  3

Total remuneration received / accrued in this year of assessment in respect of foreign services rendered

R

Remuneration exempt

R

**Qualifying criteria for s10(1)(o)(ii) exemption relating to s8A/8C gains (excluding dividends)**

Are you a SA resident as defined in the Income Tax Act? Y  N

In respect of the s10(1)(o)(ii) exemption claimed, how many s8A/8C gains are applicable during this year of assessment?  2

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NO XXXXXXXXXXXX

P XXXXXX

Y XXXX



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Partnership Details

Provide full name of partnership of which you were a partner during the year of assessment

Grid for entering partnership name

Specify your profit / loss sharing % during the year of assessment: [ ] [ ] , [ ] [ ] %

Indicate whether you derived a profit / loss from the partnership during the year of assessment? Profit [ ] Loss [ ]

Unemployed

Were you unemployed for the full year of assessment? Y [ ] N [ ]

Did you receive no income and realise no capital gain / loss? Y [ ] N [ ]

Periods of Unemployment

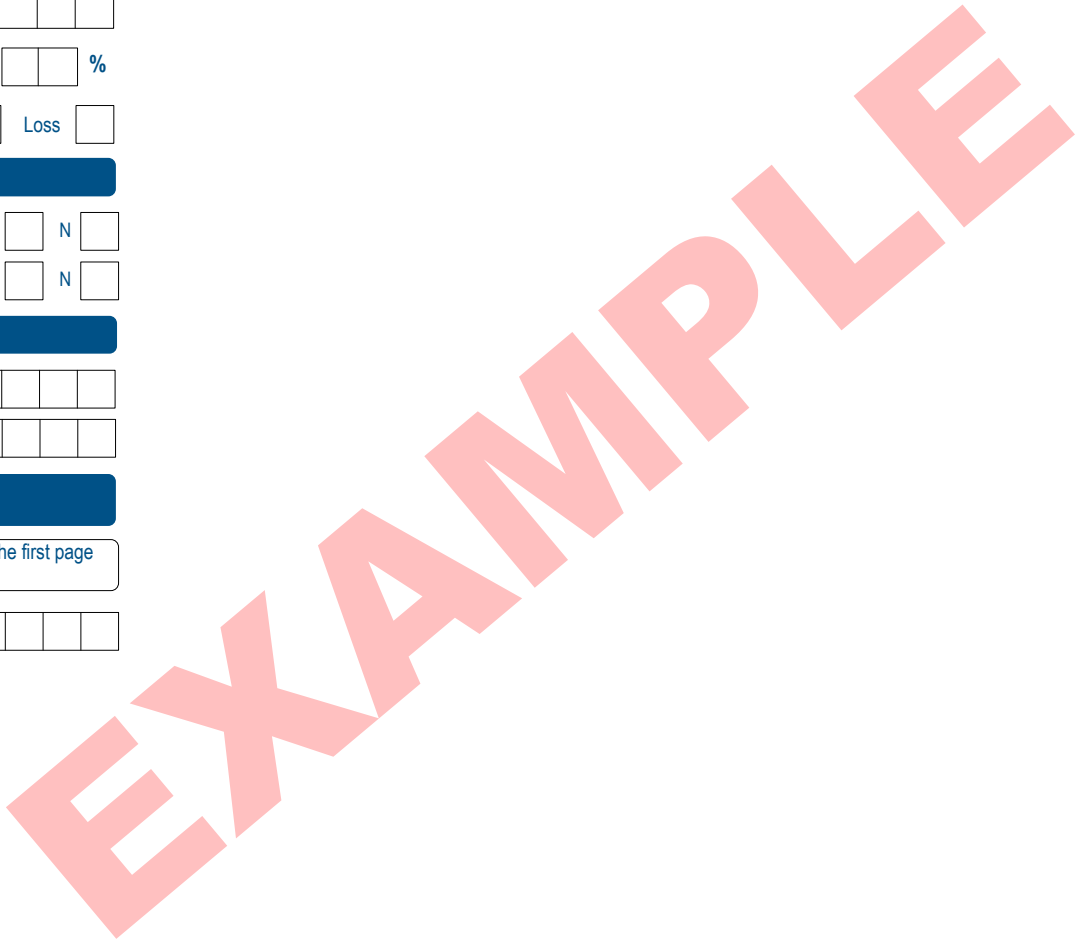
Unemployed from (CCYYMMDD) [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Unemployed to (CCYYMMDD) [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Voluntary Disclosure Programme

If no VDP application was made, change your VDP answer to "No" on the first page of this return

Please indicate the VDP application No. issued by SARS [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]



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NO XXXXXXXXXXXX

P XXXXXX

Y XXXX



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