

Bank Account Details

All changes will be verified before your banking details are updated. SARS will notify you if you are required to visit a SARS branch to present supporting information. Bank account details are required for refunds.

BNKIF01

Mark here if you do not have a local bank account Account No. Branch No. Account Type: Current Savings Transmission

Bank Name

Branch Name

Account Holder Name (as registered at bank)

Taxpayer Representative Details

PODIF01

Surname Initials

First two names Taxpayer ref. no.

ID No. Date of Birth (CCYYMMDD) Passport No. Passport Country (e.g. South Africa = ZAF)

Home tel no. Bus tel no. Passport issue date (CCYYMMDD)

Cell no. Fax no. Date of Appointment (CCYYMMDD)

Email Address

Physical Address

Unit No. Complex (if applicable)

Street No. Street / Farm name

Suburb / District

City / Town

Country code (e.g. South Africa = ZA) Postal Code

Tax Practitioner Details (if applicable)

TPDIF01

Surname / Registered name

Initials (if applicable)

Registration No.

Tel No.

Contact Email

Trading Details

TDINF01

Is the Trust trading?

Y N

Financial year end (MM)

If 'Yes', will the trust be liable for provisional tax?

Y N

Three Main Partners Details (Only in case of partnership)

MPDIF01

Number One

Surname

Taxpayer ref no.

Initials

ID No.

Passport No.

Passport Country (e.g. South Africa = ZAF)

Number Two

Surname

Taxpayer ref no.

Initials

ID No.

Passport No.

Passport Country (e.g. South Africa = ZAF)

Number Three

Surname

Taxpayer ref no.

Initials

ID No.

Passport No.

Passport Country (e.g. South Africa = ZAF)

Two Other Trustees Details (Continued)

OTRIF01

Surname Initials

ID No. Date of Birth (CCYYMMDD) Passport No. Passport Country (e.g. South Africa = ZAF)

Physical Address

Unit No. Complex (if applicable)

Street No. Street / Farm name

Suburb / District

City / Town

Country code (e.g. South Africa = ZA) Postal Code

Passport issue date (CCYYMMDD)

Taxpayer ref.no.

Contact Numbers

Bus Tel No.

Fax No.

Cell No.

For Office Use Only

RQINF01

Initial year of liability Current financial year end **Taxpayer Sub-Category**

Normal Intervivos
 Mortis Causa Special Trust
 Exempt Institution

Taxpayer Type

Non-Provisional
 Provisional

Suspense CodeDormant **Suspense Effective Date (CCYYMMDD)** **Information Required for Registration / Change of Registered Particulars**

FOINF01

The following information is required in order for SARS to process your application. Your application may be rejected where the required information has not been submitted.

Application Form

This IT77TR form must be completed in full and signed by the representative taxpayer.

Documents required for Trust

Copy of the certificate of incorporation for a trust (Master's Office)
 Copy of a trust deed registered with the Master's Office
 Certified copy of identity document/driving licence/passport/temporary identity document/asylum seekers certificate/permit of trustee(s)
 Copy of the will, liquidation and distribution account (Mortis Causa)
 A valid lease agreement signed by the lessor
 Any statutory body, local government or any other legal document statement that bear the residential address of the taxpayer.

Proof of address

General accounts: Municipal account/ utility account i.e. rates and taxes/ water or electricity account/student fee account/medical aid statement/mortgage statement from mortgage lender/All telephone network accounts/ eToll account/Major retail accounts
 Government documents: Motor vehicle licence documentation/court order/subpoena/traffic fine/UIF pay-out document/pension pay-out document
 Insurance and investment documents: Life assurance document/short-term insurance document/health insurance document/funeral policy document/investment statement from share, portfolio or unit trust
 CRA01 form: Where the place of residence is in the name of a third party, a 'Confirmation of Entity Residential / Business Address (CRA01) form must be completed by the third party.

Bank details

Original letter from bank not older than one month confirming the account holder's legal name; account number, account type; branch code and the date reflecting the date on which the account was opened
 Recent bank statement with original bank stamp
 ABSA bank eStamped statement
 Internet statement with or without an original bank stamp
 A clear bank statement from an ATM machine containing all the information such as the account holder's legal names, account number, account type, branch code and the date on which the bank account was opened.

Representative Taxpayer

Certified copy of identity document/driving licence/passport/temporary identity document/asylum seekers certificate/permit
 Power of attorney (POA)/letter of authority authorising the practitioner/representative/public officer to act on behalf of the taxpayer.