

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)

Estate Details

Type of Estate

Voluntary liquidation

Effective Date (CCYYMMDD)

Meeting Dates for Insolvent Estates

First meeting
CCYYMMDD

Second meeting
(CCYYMMDD)

Special meeting
(CCYYMMDD)

Involuntary liquidation

Other: Specify

Representative Taxpayer Details

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

Postal Address

Mark here with an "X"
if same as above or
complete your Postal
Address

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

Postal Code

Contact Numbers

Tel No.

Cell No.

Fax No.

Capacity of Representative

Liquidator

Administrator

Other (Specify)

For Office Use Only

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 Code

Dormant

Suspense Effective Date (CCYYMMDD)