

Please submit the original return and retain a copy for your records.



IT3 Certificate Information

IT3-01

Certificate Details

IT3(b) - Income from Investments, Property Rights and Royalties☐

IT3(c) - Certificate of income in respect of the disposal of unit trust or other financial instruments☐

IT3(e) - Income from Purchases / Sales / Shipments of Livestock / Produce / Timber / Ores/ Minerals / Precious Stones or bonuses Paid / Accrued to Members of Co-Operative Companies or Societies☐

How many certificates do you want to submit?

Submitting Entity

Year of Assessment

Period Start Date (CCYYMMDD)

Period End Date (CCYYMMDD)

Registered Name

Universal Branch Code

Taxpayer Ref No.

Contact Person

First Two Names

Surname

Bus Tel No 1

Bus Tel No 2

Cell No.

Contact Email

L

FV

SV

CT

NO

P

Y

Please submit the original return and retain a copy for your records.

IT3 Account Holder Details

Unique No.

I3B Unique No.

Surname / Registered Name

First Two Names

ID No.

Other reg no.

Nature of Person

Date of Birth (CCYYMMDD)

FICA Status:

FICA successful

Not FICA'd

FICA exempt

Record status:

Active

Cancelled

Resident:

In RSA

No In RSA

Initials

Income Tax

Passport No.

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

Physical Address

Unit No.

Complex (if applicable)

Street No.

Street / Name of Farm

Suburb / District

City / Town

Postal Code

Postal Address

Mark here with an 'X' if same as physical address or complete your Postal Address

Postal Code

Account Information

Indicate the number of accounts for the account holder that you are reporting on

Partnerships

Is the account holder a partner in a partnership?

Y

N

If 'Yes' indicate the number of partnerships for which the account holder is a partner

### IT3 Account Holder Partner Details

**Record status:** *Active* ☒ *Cancelled* ☐

Resident:	In RSA	No In RSA
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		
26		
27		
28		
29		
30		
31		
32		
33		
34		
35		
36		
37		
38		
39		
40		
41		
42		
43		
44		
45		
46		
47		
48		
49		
50		
51		
52		
53		
54		
55		
56		
57		
58		
59		
60		
61		
62		
63		
64		
65		
66		
67		
68		
69		
70		
71		
72		
73		
74		
75		
76		
77		
78		
79		
80		
81		
82		
83		
84		
85		
86		
87		
88		
89		
90		
91		
92		
93		
94		
95		
96		
97		
98		
99		
100		

Income Tax  
Ref No.Passport Country  
(e.g. South Africa = ZAF)

## Physical Address

Postal Code

## Postal Address

Postal  
Code

Y

Please submit the original return and retain a copy for your records.

IT3(e) Account Holder Financial Details

Unique No.

Record status: 

Active ☐

Cancelled ☐

I3E Unique No.

Nature of Income - Source Code

Reference number

Units sold

Gross proceeds 

R

 ,

Net proceeds 

R

 ,

Accrual / Payment Date (CCYYMMDD)

Submission Period 

1 March - 31 August ☐

1 March - 28/29 February ☐

Nature of bonus

Bonus Amount 

R

 ,

L

FV

SV

CT

NO

P

Y