



## Tax Document Checklist

### PROVISIONAL TAXPAYERS

LIST OF TAX DOCUMENTS REQUIRED FOR THE 2024 TAX YEAR (PERIOD 1 MARCH 2023 TO 29 FEBRUARY 2024):

01	IRP5/IT3a	
02	IT3(b) Interest income tax certificate	
03	IT3(c) Capital Gains tax certificate	
04	IT3(s) Tax free investments	
05	Retirement Annuity certificates	
06	S18(A) Donations tax certificate	
07	Travel Logbook	
08	Medical Aid tax certificates	
09	Additional medical expense not claimed from fund (Invoice and proof of payment)	
10	Documents (including ITR - DD form) and details of disability claims (where applicable)	
11	Rental Schedule and supporting documentation	
12	Home office expense claims schedule and supporting documentation	
13	Local business income schedule and supporting documentation (Business trial balance / income statement)	
14	Statement of assets and liabilities	