



CHARTERIS & BARNES

CLOSE CORPORATION

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Dear Client

REQUEST FOR TAX INFORMATION

We hope this letter finds you well. You will soon note a request from our offices for taxation and other financial information that is required to prepare the relevant annual financial statements and accompanying Income tax returns for the 2024 Income Tax year. As the deadline for submission approaches, it is crucial to obtain this information promptly to ensure compliance with tax regulations and avoid any potential penalties for late submission.

Please note the following deadline dates:

Individual taxpayers (non-provisional):	- 21 October 2024
Provisional taxpayers (Individuals):	- 20 January 2025
Trusts IT3(t)	- 30 September 2024
Trusts:	- 20 January 2025
Companies/cc's (Feb year end)	- 28 February 2025

Please note that there is an additional reporting requirement for local Trusts – IT3(t). The IT3(t) submission is a requirement by the South African Revenue Service (SARS) for **trusts** to report any amount vested in a beneficiary during a specific tax year. It is a crucial part of ensuring compliance with tax regulations and providing transparency in trust transactions.

We kindly request that the information be sent to us timeously, to allow sufficient time for processing and submission. If there are any issues or delays in providing the requested information, please inform us as soon as possible to discuss alternative arrangements.

Failure to submit the required tax information on time may result in administration penalties and interest charges. Therefore, your prompt attention to this matter would be greatly appreciated.

Should you need any additional details or have any questions, please do not hesitate to contact our offices.

Thank you for your co-operation and understanding.

Yours faithfully,

CHARTERIS AND BARNES CC

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