



CHARTERIS & BARNES

CLOSE CORPORATION

CHARTERED ACCOUNTANTS (SA)

T : +27 (0) 43 704 2200
F : +27 (0) 43 721 1583
e|@cbarnes.co.za
www.cbarnes.co.za

The Hub
Bonza Bay Road
Beacon Bay
5241

Postnet Suite O29
Private Bag X3
Beacon Bay
5241

07 May 2026

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 2026 Income Tax year. We anticipate that 2026 tax filing season will open in early July 2026 and it is crucial to obtain your 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):	- 23 October 2026
Provisional taxpayers (Individuals):	- 22 January 2027
Trusts IT3(t)	- 22 January 2027

Companies, approved public benefit organisations, and approved recreational clubs must submit their income tax returns within 12 months from the date on which their financial year ends.

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

Members: Ignatius Wait CA(SA), Gary McLean CA(SA), Laurene Mokawem CA(SA), Rino Neppen CA(SA) & Solize Coetzer CA(SA)
Partners: Craig Schenk MBA, PA(SA), Francois Nel CA(SA), Celia Visser CA(SA) & Luxolo Tom AGA(SA)
Professional Consultant: HA Wormald
Associates: J Fourie & JG Mattheüs
Offices in: East London, Queenstown, King William's Town & Port Alfred

Charteris & Barnes CC | Registration No: 1988/O13996/23 | VAT Registration No: 4520112519 | SAICA No: O3036261

