CLIENT INFORMATION

2024 TAX SEASON

Prepared By:
Fourie Financial Services

KOTIE FOURIE BROKERS 1998/072879/23 T/A
Fourie Financial Services & Professional Accountants (SA)

Tel:
+27 (0) 53 631 1016
+27 (0) 53 492 3319
e-Mail:
ffsadmin1@deaarsa.co.za
Web:
www.fouriefinancialservices.co.za

Address:
16 Amalia Street
P.O. Box 731
De Aar
7000

Kotie Fourie: *Principal*
Amelia Fourie: *Member*
FSP4332
MASTHEAD900993
SAIT0092286
Elzaan Fourie:
Reg Prof. Accountant SAIPA27641
Stephan Fourie:
Reg Business Accountant SAIBA2463

Dear Client

NOTICE IN TERMS OF SECTION 18 PROTECTION OF PERSONAL INFORMATION ACT, 2013

Why we ask for personal information from our clients and how we use it.

The purpose of this notice is to let you know:

• How we, Fourie Financial Services & Professional Accounts (SA), will use and disclose the personal information of our clients and that of any other people insured under their policies.

• What your rights and responsibilities are when providing your personal information to us.

• What our responsibilities are to comply with the Protection of Personal Information Act 4 of 2013 (the POPI ACT) to keep your information safe.

Consent to use the personal information of our clients.

To comply with the POPI Act, Fourie Financial Services & Professional Accountants (SA), has strict policies, rules and measures in place to protect the confidentiality of the personal information of our clients. The POPI Act requires us to inform you of the purpose(s) for which we will process your personal information. These include:

• Sharing your personal information with contracted service providers, who are legally bound to protect your information and must agree to our confidentiality policies and rules.

The right and responsibilities of our clients.

When our clients give us their personal information and personal information for any other people insured under their policies, they do so voluntarily so that we can do business with them.

They give us their consent to collect, record, store, update and use or process all personal information provided to us, which includes health and financial information.

They have the right to know what personal information we have about them and to access it at any time.

They have the right to ask us to update or correct the information we have for them at any time.

They warrant that they are authorised to provide us with the personal information.

They have the right to object to us using the personal information, except when we need it to do business with them, or to comply with legal requirements.

If our clients think their personal information has been tampered with, or that it has not been protected, they can discuss their concern with us by sending an email kotie@deaarsa.co.za . If they are not satisfied with the outcome after discussing it with us, they may refer their complaint to the Information Regulator by sending an email to inforeg@justice.gov.za or by calling 012 406 4818.

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Our responsibilities and why we need the personal information of our clients.

• Having the personal information of our clients and that of any other people insured under their policies or administered on a retirement fund enables us to do business with them.

• We need their personal information and that of any other people insured under their policies to:
• Fulfil our obligations regarding their products or benefits;
• Administer their products or benefits and related service and to process any claims
• submitted, and
• Provide services, advice and/or intermediary services linked to their products or benefits;
We may use their personal information for historical, statistical and research purposes.
We will determine how or why their personal information is processed at all times.
We will not share their personal information with any third parties, unless:
o They have given consent for us to share it; or
o Sharing it is necessary to put an agreement in place that is for their benefit; or
o We are allowed to share the information as prescribed in the POPI Act.
We will only use their personal information for the purpose which it has been provided to us and not for any other reasons, unless:
o They have given consent for us to use it for another reason; or
o It is necessary to put an agreement in place that is for their benefit; or
o We are allowed to use the information as prescribed in the POPI Act.
We will make sure we put reasonable measures in place to protect their personal information.

Responsibilities of our partners and contracted service providers.

To administer their products properly, we need to share the personal information of our clients with contracted service providers, such as underwriters, in South Africa.

Fourie Financial Services & Professional Accountants (SA) will make sure that the contracted service providers agree to our privacy and security policies and rules if they need to access their personal information for the following purposes:
• To implement their products or benefits.
• For underwriting and reinsurance purposes.

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To make it possible for them to view products and benefits and transact on their fund administrator's website.

• To do a risk profile analysis of their existing products or benefits, or to do underwriting.
• To carry out statistical analysis.
• To analyze consumer needs and develop new products and services.
• To conduct research among our clients or members to gain important insights into and ongoing understanding of their experiences and changing needs, so that we can keep improving our products and service offerings.

Should you have any questions or concerns you are welcome to contact our office during office hours.

Yours faithfully

JD FOURIE
PRINCIPAL

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ACCOUNTANTS • BROKERS

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FEE AND PAYMENT POLICY

We will render invoices in respect of the services comprising fees, disbursements and VAT thereon (where appropriate), together with any other foreign taxes (if applicable) that might be payable thereon (“fees”). Details of our fees and any special payment terms will be set out in the engagement letter.

Our fees are based on the time spent on your affairs by our partners and staff, and on the levels of skill and responsibility involved, the nature and complexity of the resources required to complete the engagement. These fees may differ from estimates that may have been supplied, which estimates will be provisional only. Stringent reporting requirements or deadlines imposed by you might require work to be carried out at a higher level than or outside normal working hours. This may result in increased costs. Additional fees may also result from material changes in the services or from difficulties in obtaining information, which could normally have been foreseen.

Fees are calculated either:
- On an hourly basis at charge-out rates applicable to the person undertaking the work. Stringent reporting requirements or deadlines applicable by you might require work to be carried out at a higher level than usual or in extreme cases outside normal working hours. This will result in increased costs. Our current maximum and minimum rates for normal working hours applicable from time to time may be obtained on request; or
- On a tariff basis for taxation or company secretarial services. These rates are available on request at the time matters are specifically referred to us.

Disbursements in respect of travelling expenses, photocopies, stationery, revenue stamps, postage, emails, and telephone calls and others will be debited to your account in the month in which the cost of service incurred by us, at our predetermined rates.

In return for the delivery of the services by us, you will be required to pay our fees, without any right of set-off, on presentation of our services.

Delivery of our services shall mean:
- Accounting services: five working days after our handing over the draft financial statements or upon our handing over of financial statements, whichever is the sooner;
- Company and close corporation secretarial services: five working days after our handing to you forms for signature or upon dispatch of this letter will be effective for future unless it is terminated, amended or suspended documents to the Registrar of Companies/ Close Corporations or other authorities, whichever is the sooner;
- Taxation services: upon rendering advise or upon dispatch of documents or correspondence to you or the Inland Revenue authorities, as appropriate;
- Consulting and other service: upon rendering advise or upon dispatch of correspondence, as appropriate.

We will be entitled to raise fees upon delivery as set out above. In the event that you are not in agreement with any fee raised you will notify us in writing of your objection within 21 working days of our dispatch of the fee note. Failure to do so will constitute acceptance of the fee. Approval of financial statements or minutes reflecting our fees will constitute acceptance of the fees, including any under provision which does not warrant redrawing the financial statements. Notwithstanding anything to the contrary contained herein, should our accrued fees reach a level which we consider to be material, such accrued fees will become due and payable immediately upon presentation of our fee note, failing which the rendering of all further professional services will be suspended pending receipt of payment.
In the event of your appointing an alternative firm of accountants in our stead, or otherwise terminating our mandate, we will be entitled to raise a fee upon receipt of such notification for an amount adequate to cover all work done to date and not yet billed, at our standard charge-out rates, including disbursements incurred. In such event, you undertake to settle our account in full prior to handing over books and records to you or our successor.
Our fees will be included of VAT which will rank for deduction as input tax by registered vendors.

Subject to a foregoing, our fees are payable on presentation. We will be entitled to charge interest on all amounts outstanding, for more than 30 days from the date of presentation of our fee note at the maximum rate allowed by law. Such interest will be calculated on a monthly basis. All payments will be allocated first to interest, then to outlays, then to the longest outstanding fee.

Without prejudice to any other rights, that we reserve the right to suspend or terminate the performance of the services or any part thereof to you immediately, at any time, with or without notice, should payment of any of our fees be overdue. We will not be liable for any penalties and interest arising at SARS if your account with us is in arrears.

The fees will be subject to review by us each year and will vary with a number of factors including the extent of the assistance we receive from members of staff in preparing routine schedules and analyses.

It is our usual practice to provide estimates of our fees in advance of the work commencing and we shall require payments on account as our work progress.

We trust you find the above in order.
Regards
E FOURIE
Professional Accountant (SA)

Fourie Financial Services
ACCOUNTANTS • BROKERS

Standard Bank

STANDARD BANK
TPFA CLIENT CARE SC

2022-04-12

01-43-42

Date 12 April 2022

To Whom It May Concern

Re: Confirmation of Bank account

This letter serves to confirm that the below mentioned customer holds the below Standard Bank account.

Legal entity name	KOTIE FOURIE MAKELAARS BK
Name of accountholder	KOTIE FOURIE MAKELAARS BK
Registration/Identity/Passport number	1998/072879/23
Account number	063366053
Account type	BUSINESS CURRENT ACCOUNT
Branch	HOPETOWN
Branch code	050103
Branch code (electronic payments)	051001
SWIFT address	SBZA ZA JJ
Date account opened	12 April 2022

This letter or your reliance on same does not give rise to any obligations or liability on the part of the Bank and/or its officials.

We trust the above meets with your requirements.

Yours sincerely

KOTIE FOURIE BROKERS 1998/072879/23 T/A
Fourie Financial Services & Professional Accountants (SA)

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Client information

Name and Surname: ______________________________

ID Number: ______________________________

Address: ______________________________

____

Postal address: ______________________________

Contact details:

Cell ______________________________

Work ______________________________

Email ______________________________

Banking details:

Bank name ______________________________

Branch code ______________________________

Account number ______________________________

Registration details:

Income tax number ______________________________

VAT number ______________________________

PAYE number ______________________________

Employer ______________________________

Employer address ______________________________

____

Fourie Financial Services
ACCOUNTANTS • BROKERS

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Marital Status

Married / Unmarried ______________________

In/ out of community ______________________

Spouse name ______________________

Spouse ID number ______________________

Spouse contact number ______________________

Business details

Business name ______________________

Registration number ______________________

Address ______________________

Other shareholders/ ______________________

Directors ______________________

Contact details ______________________

Beneficial ownership

Are you a shareholder of a company? ______________________

If yes, please specify: ______________________

Are you a trustee or a beneficiary of any trust? ______________________

If yes, please specify: ______________________

I DECLARE THAT THE ABOVE INFORMATION IS TRUE AND CORRECT.

____

SIGNATURE

YOUR INFORMATION WILL NOT BE SHARED TO A THIRD PARTY WITHOUT YOUR CONSENT.

SOUTH AFRICAN REVENUE SERVICE
Special Power of Attorney to Tax Practitioner

The Commissioner for the South African Revenue Service

I, the undersigned ___________________________ Identity/Passport Number:
in my capacity as the representative taxpayer hereby appoint Elzaan Fourie, Identity/Passport Number: 890809 0146 081 of Tax Practitioner Firm Fourie Financial Services, to act on my behalf in respect of the following tax matter(s) detailed below:

1.INCOME TAX NUMBER: ____

- To apply for registration and obtain a taxpayer reference number in respect of the above mentioned tax(es)
- To communicate to SARS any change of registered particulars
- To request and/or follow up on the issuing of tax clearance certificates
- To complete and/or submit returns to SARS
- To communicate with SARS and to submit relevant material to SARS
- To lodge and pursue an objection against an assessment raised or decision made by SARS
- To file and pursue an appeal against an assessment raised or decision made by SARS
- To apply for deregistration in respect of the abovementioned tax(es)

I confirm that the authority that has been delegated to Elzaan Fourie by this Special Power of Attorney may be performed by a person who is under his or her direct supervision.

I confirm, for the purpose of absolute clarity that anything done by Elzaan Fourie or person under his / her direct supervision pursuant to this Special Power of Attorney shall be regarded, for all intents and purposes, as having been done by myself and I undertake to ratify any actions taken in terms of this Special Power of Attorney.

This Special Power of Attorney shall operate for a period of 24 month(s) from the date of my signature.

Signed at . . . . on this . . . . day of . . . . 20.......

Signature:____________________

As witnesses:

1. __________________________ Full Name: __________________________________

2. __________________________ Full Name: __________________________________

LIST OF DOCUMENTS WE NEED TO PROCESS YOUR TAX RETURN

Please note, compulsory documents must be submitted to us before we can process your return

COMPULSORY:

- 01 SIGNED CLIENT INFORMATION FORM 2024 ☐
- 02 CLEAR COPY OF ID ☐
- 03 PROOF OF RESIDENCE, NOT OLDER THAN 3 MONTHS ☐
- 04 PROOF OF BANKING DETAILS, NOT OLDER THAN 3 MONTHS ☐
- 05 PROOF OF PAYMENT ☐

OTHER DOCUMENTS

- 06 IRP5 ☐
- 07 INCOME TAX CERTIFICATES OF INTEREST RECEIVED ON ALL ACCOUNTS AND TAX FREE INVESTEMENTS ☐
- 08 MEDICAL AID TAX CERTIFICATE AND PROOF OF ADDITIONAL EXPENSES ☐
- 09 ANNUITIES, PENSION FUND CONTRIBUTIONS ☐

LIST OF DOCUMENTS WE NEED TO PROCESS YOUR TAX RETURN

Please note, compulsory documents must be submitted to us before we can process your return

OTHER DOCUMENTS CONTINUED

10	LOGBOOK, PROOF OF PURCHASE OF VEHICLE	☐
11	RENT: PROOF OF ALL INCOME AND EXPENSES; PROOF OF RENTAL CONTRACTS	☐
12	COMMISSION: PROOF OF ALL INCOME AND EXPENSES; PROOF OF OFFICE SPACE AND BUILDING PLANS	☐
13	PROOF OF CAPITAL GAINS / LOSS TRANSACTIONS	☐
14	PROOF OF SOLAR INSTALLATIONS AND COC	☐
15	BENEFICIAL OWNERSHIP DETAILS	☐
16	A18(A) DONATIONS RECEIPTS	☐
17	CRYPTO CURRENCY TRANSACTIONS	☐
17	ANY OTHER SUPPORTING DOCUMENTS RELATED TO YOUR RETURN	☐

LETTER OF AUTHORITY TO FOURIE FINANCIAL SERVICES AND PROFESSIONAL ACCOUNTANTS (SA)

I,____, ID _________________________________
in my capacity as Taxpayer / Director / Trustee / Member / Public Officer hereby authorize Elzaan Fourie, ID 890809 0146 081 and any employee of Fourie Financial Services and Professional Accountants (SA) Reg No 2022/482826/07 to do the following:

- To act on my behalf regarding all my income tax affairs;

- I also authorize the above-mentioned to sign income tax returns, financial statements, as well as payments, queries and other income tax related documents on my behalf.

- I further authorize that the company Fourie Financial Services and Professional Accountants (SA) may share my information internally in both the Accounting – and Insurance department. My information will be limited to the offices of Fourie Financial Services and Professional Accountants (SA) and will not be shared with a third party without my knowledge and consent.

- I acknowledge that I received the privacy policy regarding the POPIA Act and that I am satisfied with their privacy policy.

To send all correspondence, letters, accounts and any other related enquiries to my Email account(s) as follow:

____

This letter of authority may only be cancelled in writing.

____

FULL NAME

____

SIGNATURE

____

DATE

SARS

Is this declaration made by a Tax Practitioner?	YES / NO	
Mark with a "X" if you ceased to be a resident of the RSA during this year of assessment.	YES / NO	
Were you unemployed for the full year of the assessment and did not receive any income including any capital gain / loss?	YES / NO	
Were you unemployed for any period during this year of assessment?	YES / NO	
Did you received income that is reflected on an IRP5 or IT3(a) certificate?	YES / NO	
How many certificates did you received?		
Did you pay any medical expenditure (including medical scheme contributions made by you or your employer towards a medical scheme where you are the principal / main member)?	YES / NO	
Did you pay any medical expenditure (including medical scheme contributions where you are not the principal / main member of the medical scheme) in respect of any immediate family member who is dependent on you for family care and support?	YES / NO	
Did you or your employer make any retirement annuity fund contributions for the benefit of yourself?		
Sanlam	YES / NO	
Glacier	YES / NO	
Old Mutual	YES / NO	
Liberty	YES / NO	
Other	YES / NO	
Did you apply for or were places under the following during the last 12 months? Administration, Sequestration, Insolvent, Dormant, Elucidation. If yes, please give date and reason?	YES / NO	

SARS

Do you want to claim a deduction against a travel allowance?				
	START	END	PRIVATE	BUSINESS
How many vehicles should be used in the calculation?				
Do you want to claim a deduction against an employer provided vehicle?	YES	NO		
Did you receive any form of remuneration for foreign services rendered?	YES	NO		
Did you receive interest (local and foreign), distributions from a Real Estate Investment Trust (REIT), taxable foreign dividends and / or dividends deemed to be income in terms of section s8E & s8EA? (Excluding amounts received as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)	YES	NO		
Are you a trustee/and/or beneficiary of any trust? If yes-please specify name and trust number.	YES	NO		
Was any income distributed to you / vested in you as a beneficiary of a trust, or deemed to have accrued in terms of s7?	YES	NO		
Were there any transactions (contributions, transfers, withdrawals, income received/accrued) on any Tax Investments held by you during this year of assessment?	YES	NO		
Did you derive income from the letting of fixed property(ies)? (Excluding amounts received/accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)	YES	NO		
Are you a director of a company or a member of a close corporation?	YES	NO		
Does any declaration in this return relate to an application made under the SARS Voluntary Disclosure Program?	YES	NO		
Do you want to claim donations made to approved organisation(s) in terms of s18A?	YES	NO		

SARS

Did you receive any other income (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7) and / or incur any other allowable expenses not addressed above?	YES NO	
FOREIGN INCOME: (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)		
Did you receive any foreign income apart from foreign interest and foreign dividend income and excluding foreign capital gain transactions?	YES NO	
CAPITAL GAIN / LOSS: (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)		
Did you dispose of any local assets attracting capital gain or loss?	YES NO	
Did you dispose of any foreign assets attracting capital gain or loss?	YES NO	
PARTNERSHIPS:		
Are you a partner in a partnership(s)?	YES NO	
LOCAL BUSINESS, TRADE AND PROFESIONAL INCOME: (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)		
Did you derive income from local business, trade or profession other than rental income from the letting of fixed property(ies)? YES NO		
LOCAL FARMING:		
Did you participate in any local farming operations?	YES NO	
OTHER TAXABLE RECEIPTS AND ACCRUELS: (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)		
Did you have any receipts and accruals not addressed by the previous questions but excluding amounts that you consider non-taxable?	YES NO	
FOREIGN TAX REFUNDED / DISCHARGED:		
Were any foreign tax credits refunded / discharged during the year of assessment for which a rebate / deduction was allowed during a previous year of assessment?	YES NO	
AMOUNTS CONSIDERED NON-TAXABLE: (Excluding amounts received / accrued as a beneficiary of a trust(s), or deemed to have accrued in terms of s7)		

SARS

Did you receive any income that you consider non-taxable?	YES / NO	
VENTURE CAPITAL COMPANY INVESTMENTS:		
Did you invest in SARS approved Venture Capital Companies in exchange for shares during this year of assessment?	YES / NO	
Were any SARS approved Venture Capital Company shares sold during the year of assessment for which a tax deduction was allowed?	YES / NO	
OTHER DEDUCTIONS:		
Did you incur any expenditure that you wish to claim as a deduction that was not addressed by the previous questions?	YES / NO	
Did you claim any depreciation on an asset?	YES / NO	
If yes, was the asset owned by you or acquired by you as purchaser in terms of an agreement contemplated in par. (a) of the definition of “instalment credit agreement” in s 1 of the Value-Added Tax Act?	YES / NO	
Was the asset used for the purpose of your trade?	YES / NO	
Did you claim any “home office expenses”?	YES / NO	
If yes, is your income derived mainly from commission or other variable payments based on your work performance?	YES / NO	
Is the home office regularly and exclusively used for the purpose of your trade and is it specifically equipped for such purpose?	YES / NO	
Are your duties mainly performed otherwise than in an office provided by your employer?	YES / NO	
If you did not receive a travel allowance from your employer (not reflected on your IRP5) was your claim for travel expenditure based on a logbook?	YES / NO	
Are you married in community of property?	YES / NO	
IF YES: Please declare the following of spouse: • Interest • Dividends		

• Rental income

CONFIRMATION OF DETAILS AND ACCEPTANCE OF FEE

I, ______________________________________ hereby confirm that an employee of Fourie Financial Services and Accountants in Practice confirmed my details with me and that the details given to Fourie Financial Services is true and correct.
I further confirm that I am aware of the following:

• A basic fee of R____________, is payable before any submissions to SARS will be made.

The basic fee includes the following:

• Analysis and calculation of tax payable / refundable
• Submission of tax return with necessary documentation

If any additional services are to be provided, it will be charged on an hourly fee.
Additional fees include, but is not limited to:
• Drafting of correct logbook
• Documentation, correspondence, arrangements, follow-up with SARS if audit is conducted • Disputes and submissions
• Preparation of income and expenditure statements
• Any other services that will be communicated to the client

I declare that I accept that the total fee payable is based on the total hours spent on my tax affairs.

Signed on ____ 20_____.

____
Client

____
Employee

FOURIE FINANCIAL SERVICES AND PROFESSIONAL ACCOUNTANTS (SA)

WHAT WE OFFER

- Short term insurance (personal, commercial & agricultural)
- Life insurance (death, disability, impairment, severe illness and trauma)
- Bestmed medical scheme
- PPS
- Annuities
- Estate and retirement planning
- Income protectors
- Investments
- Medical quotes, gap cover
- Money market
- Saving plans
- Tax free investments
- Wills and deceased estates

FOURIE FINANCIAL SERVICES AND PROFESSIONAL ACCOUNTANTS (SA)

WHAT WE OFFER

- All tax related services including registrations, filing and submissions
- Composing of financial statements for all entities
- Auditing and independent reviews
- Monthly bookkeeping services for all entities
- Monthly submissions of VAT, PAYE and UIF
- Budgets and advise
- Company registrations, CIPC compliance and filing of annual returns
- Compensation fund submissions
- Business plans and concepts
- Assistance with tender applications
- BBEE Affidavit Certificates

TALK TO US

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