



**ABC**  
Alice Business Consulting

**Financial Services • Auditing • Taxation  
Bookkeeping • Secretarial**

Pr No. 951714  
Tax Practitioner: PR-07F5163  
<https://alicebc.co.za>

Tel: 011 435 1979 or 011 435 7268  
Cell: 072 379 8268  
[alice@alicebc.co.za](mailto:alice@alicebc.co.za)

## **Client information for the 2023 tax season**

### **SARS Auto-Assessment 2023**

Auto-Assessments will be issued by SARS to taxpayers deemed as “Less Complicated” this year.

SARS will use data collected from employers, financial institutions, medical schemes, retirement annuity fund administrators and other 3<sup>rd</sup> party data providers to generate the assessment automatically, without any input from the taxpayer.

With auto-assessments, taxpayers will be notified by SMS or email if they were selected to receive an auto-assessment.

Once the notifications are sent out, we will review our clients to determine who was auto assessed.

### **SHOULD I ACCEPT THE AUTO ASSESSMENT?**

**No**, we think there are risks involved.

Your auto-assessment may be inaccurate and accepting it could result in you paying more tax than necessary.

### **Why?**

- SARS may not have received all your tax certificates.
- SARS may not have your most up-to-date tax certificates.
- You may miss out on claiming certain deductions, which won't appear on your auto-assessment e.g., wear and tear, home office, donations to charities, travel expenses and medical expenses that you paid personally.

Even though you have been Auto Assessed, we as your tax practitioner can file your tax return as normal, which means that we can include all your possible deductions to pay less tax and maximize your chance of a possible refund.





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### What needs to be done?

- You do not have to take any action on SMS and/or email.
- ABC will retrieve the tax return and review it against the documents received from you.
- ABC will then email a draft to you for acceptance, once the signed draft is received back, we will submit on your behalf.
- Auto-assessed taxpayers have until **23.10.2023** to amend and file their reviewed returns.

### What we need from you in preparation for the filing season: -

1. Email a bank confirmation of your banking details.
2. Email an ID copy as well as a Proof of Address to confirm details on SARS Profile.
3. Email all relevant supporting documents needed to complete your tax return.
  - IRP5's
  - IT3(b) Interest Earned; (c) Capital Gains; (f) Retirement Annuity
  - Medical Aid Tax Certificates
  - Additional Medical Expenses – Schedule, Invoices and/or proof of payment.
4. Travel Expenses – Logbook
  - MUST contain – Opening & Closing Kilometers
  - Details of business mileage
    - Date of Travel, Km. Travelled, where travelled to, Reason for trip.
  - Vehicle Purchase Invoice.
5. Home Office Expenses
6. Rental Income
7. S18A Donations

Our previous letter to you contained additional relevant information.