EXCELL
FINANCIAL PROFESSIONALS
Accounting • Tax • Advisory • Financial Planning

SARS TAX SEASON OPENS 01 JULY 2026

Your personal income tax guide – covering the year ended 28 February 2027.

01 - 12 July 2026
Auto-Assessments

13 July - 23 October 2026
Non-Provisional Taxpayers

13 July 2026 - 18 January 2027
Provisional Taxpayers & Trusts

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2026 Tax Filing Season

The 2026 tax filing season officially opens on **13 July 2026**. From this date, we will be able to begin preparing and submitting your personal income tax return for the **2026 tax year**, covering the period **1 March 2025 to 28 February 2026**.

In the meantime, you will likely start receiving tax certificates from your employer, medical aid, banks, investment providers, and other financial institutions. You are welcome to forward these documents to us as they become available.

Documents Required

To ensure your tax return is completed accurately and submitted on time, please provide the following where applicable:

Employment Income

- IRP5 / IT3(a) certificates from all employers.

Medical Expenses

- Medical aid tax certificate.
- Proof of medical expenses not covered by your medical aid, including invoices and proof of payment.

Retirement Funding

- Retirement annuity tax certificates for all retirement annuity contributions made during the tax year.

Investments

- IT3(b) certificates (interest and dividends).
- IT3(c) certificates (capital gains).
- IT3(s) certificates (Tax-Free Savings Accounts).

Donations

- Section 18A certificates for donations made to SARS-approved public benefit organisations.

Travel Allowance

- A SARS-compliant travel logbook.
- Please contact us if you require a logbook template.

Commission Earners and Independent Contractors

- A detailed schedule of business expenses; or
- Your expense receipts and bank statements, and we will prepare the schedule on your behalf.

Sole Proprietors

- An income and expenditure summary for the year; or
- Bank statements covering the period 1 March 2025 to 28 February 2026, and we will prepare the annual financial statements for you.

Turnover Taxpayers

- A summary of business income received during the year; or
- Full bank statements for the period under review.

Important Record-Keeping Requirements

If you are a commission earner, independent contractor, or sole proprietor, SARS may request supporting documentation during an audit. Please ensure that invoices, receipts, proof of payment, and other supporting records are retained and readily available.

Important Tax Deadlines

Date	Description
01 July – 12 July 2026	SARS Auto-Assessments issued
13 July 2026	Tax filing season opens
23 October 2026*	Deadline for non-provisional taxpayers
22 January 2027*	Deadline for provisional taxpayers

*Deadlines are subject to confirmation by SARS.

If you receive an Auto-Assessment or any correspondence from SARS, please forward it to us so that we can review it before any action is taken.

Failure to submit your tax return by the applicable deadline may result in monthly administrative penalties and interest being levied by SARS.

Have Your Details Changed?

Please notify us if any of the following have changed during the year:

- Residential or postal address
- Contact details
- Banking details
- Marital status

Keeping your SARS records up to date helps prevent delays, verification issues, and administrative complications.

A Word of Caution

Although SARS pre-populates much of the information on tax returns, taxpayers remain responsible for retaining their original tax certificates and supporting documents.

In the event of an audit or verification, SARS may request these documents. Failure to provide them could result in deductions, credits, or PAYE being disallowed, potentially leading to additional tax liabilities.

To avoid delays in processing your return, we encourage you to submit your documentation as early as possible. We cannot guarantee submission before the filing deadline if all required information is received less than two weeks before the applicable due date.

Why Keeping Your Tax Affairs Up to Date Matters

Maintaining tax compliance helps ensure that:

- You avoid SARS penalties and interest.
- Tax clearance certificates can be obtained when required.
- Emigration and non-tax residency applications proceed smoothly.
- Offshore investment and foreign fund transfer applications are not delayed.
- Retirement fund withdrawals and benefit claims can be processed efficiently.
- Estate administration is simplified in the event of death.
- You remain fully compliant with South African tax legislation.

How to Send Us Your Documents

Please email your tax documentation to the team member who normally assists you:

Nastashja Heugh
tax@excell.co.za

Joshua da Silva
finance@excell.co.za

Gary Forster
gary@excell.co.za

Alternatively, documents may be delivered to our offices:

Excell – Financial Professionals
Unit 11, Boskruin Business Park
3 Bosbok Road
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Thank you for your continued support. We look forward to assisting you with your 2026 tax return.