

12 December 2017

Valued client

Good day

### SAVING TIME, SAVING MONEY (3)

All clients, please read further:

If you are not a client, you do not need to read further.

This is not compulsory reading for all clients.

Not only relevant to South African circumstances.

No afrikaans version of this e-mail available.

Continuing with our campaign on "Saving Time, Saving Money", assisting our clients with more cost-effective ways to save money by saving time, the next step is aimed at "smaller non-business" clients / taxpayers, individuals for whom our firm does not keep an ongoing bookkeeping, and who are generally more cost sensitive for larger time / cost variances.

In the past, SARS would communicate directly with our firm when any tax credit was refunded to a client / taxpayer. Our firm would confirm such tax credit with the client / taxpayer and proceed to update our tax register.

Nowadays SARS no longer communicate this with our firm directly, forcing onto our firm the tedious repeating process of retrieving account statements from SARS eFiling and scrutinizing these for possible tax credit refunds. Only when such tax credit refunds are found, this is confirmed with the client / taxpayer and updated on our tax register. This is an unnecessary, time-consuming and costly process.

Even though our firm has repeatedly, over the past two years, referred this matter to the [SAIT](#) to request [SARS](#) to remedy this situation, no positive outcome has been reached so far.

Understanding that most clients / taxpayers regularly visit their bank statements and receive electronic notifications about deposits paid into their bank accounts, you may be in the best position to save our firm the time to retrieve and scrutinize account statements in search of possible tax credit refunds, by simply informing us of such tax credit refunds. This furthermore avoids us requesting confirmation from you.

When doing so, please confirm in writing the (1) date, (2) description / reference and (3) amount of the tax credit refunded, as to allow our firm to update our tax register accordingly and inspect any problem areas. You are welcome to send us documentary proof of the tax credit refund, even though this is not necessary.

Please contact us, should you require any further advice or assistance.

Regards

Mr Johan de Kock

at

SUN JOMAR ACCOUNTANTS

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