



Tax

NEWSLETTER

June 2026 / Vol 8

Let's get tax season ready

With filing season starting soon, here's what you need to know and what you can start sending through.

Hi everyone,

We hope you are doing well and that the month has been kind to you.

With the new tax season starting soon, we wanted to send a friendly reminder of the important SARS dates and what you can start getting ready. We know tax season can feel a bit overwhelming, but getting your documents together early makes the process much smoother.

Important tax season dates	
Taxpayer category	Date
SARS auto-assessments	1 July - 12 July 2026
Filing season opens for individuals	Jul 13, 2026
Deadline for non-provisional individual taxpayers	Oct 23, 2026
Deadline for provisional taxpayers	Jan 22, 2027
Deadline for trusts	Jan 22, 2027

A note on auto-assessments

Some taxpayers will receive an auto-assessment from SARS between 1 and 12 July 2026.

If you receive one, please do not just accept it without checking it first. SARS uses information from employers, medical aids, banks, retirement funds and other third parties, but there can still be missing or incorrect information.

Please let us know if you receive an auto-assessment, especially if any of the following apply to you:

You had medical expenses that were not paid by your medical aid

You contributed to a retirement annuity

You received a travel allowance

You earned rental income

You had freelance, business or side income

You earned investment income or had capital gains

You made donations to a registered PBO

You worked from home and may qualify for home office expenses

You had any foreign income or foreign

If everything on the auto-assessment is correct, no further action may be needed. But if something is missing or incorrect, an updated return must be submitted before the relevant deadline.

What you can start sending us

To help us make tax season as smooth as possible, you can start gathering and sending the following documents as soon as they become available:

IRP5/IT3(a) certificate from your employer

Medical aid tax certificate

Proof of medical expenses paid from your own pocket

Retirement annuity tax certificate

Investment certificates, such as IT3(b), IT3(c) or IT3(s)

Travel logbook, if you received a travel allowance or used a company vehicle

Rental income and expense information, if applicable

Business, freelance or side-income records, if applicable

Section 18A donation certificates

Any SARS correspondence you received

Updated banking or contact details, if anything changed

Please send your documents early

We would really appreciate it if documents could be sent through as early as possible. This gives us enough time to review everything properly, ask questions where needed, and deal with any SARS verification requests without unnecessary pressure close to the deadline.

As always, please reach out if you are unsure about anything. We are here to help and will guide you through the process.

Warm regards,
Vectigal Accounting

