

SERVICE GUIDE

WHO I HELP?

SALARIED INDIVIDUALS
SELF-EMPLOYED PROFESSIONALS/FREELANCERS
EXPATRIATES
SMALL BUSINESSES AND CORPORATES
TRUSTS AND ESTATES
FAMILY OFFICES
NON-PROFIT COMPANIES

Tax Return Preparation & Filing

- Individual returns (ITR12)
- Business & corporate returns (ITR14)
- Provisional tax (IRP6)
- Trust (ITR12T) (IT3t)
- Tax Exempt Institutions (IT12EI) (IT3d)

Tax Review & Assessment Analysis

- Review SARS assessments and notices of objection
- Identify errors, missed deductions and refunds
- Advise on tax disputes and resolution strategies

Tax Planning & Strategy

- Build tax-efficient strategies to minimise liabilities
- Optimise deductions and credits
- Plan for long-term wealth creation

Accounting & Financial Statements

- Prepare and sign off financial statements
- Advice on accounting compliance and reporting
- Certify documents, affidavits and declarations

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Strategic Tax Solutions

- Individual, business and expatriate tax advisory
- VAT, SARS dispute resolution and cross-border compliance
- Estate duty and estate planning guidance

Legal & Corporate Governance

- Drafting and reviewing contracts and agreements
- Trusts, deceased estates and property law support
- Company secretarial services, employment law & compliance
- Documentation and regulatory correspondence

Business Intelligence & Advisory

- Financial modelling, scenario planning and forecasting
- Budgeting, performance monitoring and strategic guidance
- BI insights to drive informed, data-based decisions

Compliance & Risk Management

- Regulatory compliance (FICA, POPIA, BCEA etc.)
- Ad hoc filings, submissions and audit preparation
- Tailored compliance programs to mitigate risk and ensure peace of mind