

Tax certificate distribution dates for the 2017/2018 tax year



Dear Client

Over the next few months we will send all eligible investors their annual tax certificates for the tax year ending 28 February 2018. The table below shows the anticipated dates when we will send clients their tax certificates:

Certificate	Product	Distribution timeline	Available online
Retirement annuity contribution certificate	Retirement annuities	23 April – 26 April 2018	1 May 2018
IT3(b) offshore and local	Local unit trusts and offshore investments	30 April – 7 May 2018	8 May 2018
Transaction history statement	Offshore investments	2 May 2018	3 May 2018
IT3(c) offshore and local	Local unit trusts and offshore investments	14 May – 21 May 2018	22 May 2018
IT3(s)	Tax-free investment accounts	25 May – 28 May 2018	28 May 2018
IRP5/IT3(a)	Retirement annuities	30 May – 31 May 2018	1 June 2018
	Umbrella Retirement funds		
	Pension/ Provident preservation funds		
	Living annuities		

Yours sincerely

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