

CLIENT INFORMATION SHEET

Name of Company / Trust / Individual

Individual/ Trust/ Company Registered Name

Company "Trading As" Name:

Individual ID/ Trust/ Company Registration:

Income Tax Number:

VAT Number:

PAYE Number:

UIF Number:

COIDA #:

Shareholders:

1)

Indicate % shareholding

1)

Services to be provided:

INCOME TAX
RETURN

PROVISIONAL
TAX

VAT

PAYE
EMP201

PAYROLL

UIF

WCC
(COIDA)

ACCOUNTING

ANNUAL FINANCIAL
STATEMENTS

SECRETARIAL
CIPC

ANNUAL AUDIT

ANNUAL
INDEPENDENT
REVIEW

ATTORNEYS TRUST
ACCOUNT AUDIT

MONTH WORK



Contact details of Company / Individual

Office Number:	
Fax Number:	
Mobile Number:	
E-mail Address:	
Postal Address:	
Physical Address:	

Person Responsible for Account (Accounting Department)

Name and Surname:	
Office Number:	
Fax Number:	
Mobile Number:	
E-mail Address:	

Managing Member/ Director/ Trustee Information

Surname:	
Full Forenames:	
Former Surname (if applicable):	
Identity Number:	
Nationality:	
Occupation:	
Office Number:	
Fax Number:	
E-mail Address:	
Mobile Number:	

THE PROTECTION OF PERSONAL INFORMATION ACT - CUSTOMER CONSENT NOTICE

PRIVACY IS PARAMOUNT

This Notice explains how we obtain, use and disclose your personal information, in accordance with the requirements of the Protection of Personal Information Act No 4 of 2013 ("**Act**"). We are committed to protecting your privacy and to ensure that your personal information is collected and used properly, lawfully and transparently.

Why?

We collect and process your personal information mainly to:

1. Deliver accounting, tax and related services to you;
2. Invoice you.

We will use your personal information only for the purposes for which it was collected and agreed with you. In addition, where necessary your information may be retained for legal or research purposes.

What?

For this purpose, we will collect the information on page 1 and 2 of this document. We collect information directly from you where you provide us with your personal details..

Disclosure of information

We may disclose your personal information to our service providers who are involved in the delivery of products or services to you. We may also disclose your information where we have a duty or a right to disclose in terms of law or industry codes, where we believe it is necessary to protect our rights or to our auditors, legal advisors, etc.

Storage and retention and destruction of information

We will store your personal information electronically in a centralised data base, which, for operational reasons, will be accessible to all within the Organisation on a need to know and business basis, save that where appropriate, some of your personal information may be retained in hard copy. We will ensure that your personal information which provide to us will be held and/or stored securely. Once your personal information is no longer required due to the fact that the purpose for which the personal information was held has come to an end and has expired, such personal information will be safely and securely archived for such periods as may be required by any law applicable in South Africa. Thereafter we will ensure that such personal information is permanently destroyed.

Your Rights: Access to information

You have the right to request a copy of the personal information we hold about you. To do this, simply follow the procedure as set out under our PAIA and POPIA Manual and specify what information you require. You have the right to ask us to update, correct or delete your personal information.

How to contact us

If you have any queries about this notice, you need further information about our privacy practices, if you wish to withdraw consent, exercise preferences or access or correct your personal information, please contact us.

Declaration and informed Consent

I, the signatory hereby acknowledge that I have read the terms and conditions reflected above, that I fully understand the meaning and effect thereof, that all personal information supplied to the Organisation is accurate, up-to-date, not misleading and that it is complete in all respects, to immediately advise the Organisation of any changes to the personal information should any of these details change, to give the Organisation permission to process the personal information, as provided above, and acknowledge that I understand the purposes for which it is required and for which it will be used.

Signed at _____ on this _____ day of _____ 2024.

Print name in block letters

Signature