



2020 DECEMBER BREAK INFORMATION FOR CLIENTS

**SCROLL DOWN FOR - STAFF CONTACT DETAILS – SHORT-TERM INSURER
CONTACT DETAILS –TAX GRACE PERIOD – ANNUITY INCOME PAYMENT DATES**

Please find below direct contact details of all staff on standby to deal with emergencies should one arise over the December break.

Should you not be able to reach the person on the number provided below, please call Linda on 079 541 7512. Linda will leave a WhatsApp message on that person's personal phone for them to contact you.

Name	Division	Cell Number	Detail
Andrew	Wealth	063 321 7399	Intern. New business and servicing. Medical Aids & GAP Cover. In the process of migrating across to the Wealth Division.
Andrisha	Wealth	063 378 1473	Representative. New business. Investment Accounts, Tax Free Savings Accounts, Retirement Annuities, Living Annuities, Pension and Provident Preservation Funds, Endowments.
Bernelee	Tax	078 708 4536	Administrator providing admin support to Geraldine and understudy to Geraldine.
Brady	Wealth	071 843 3933	Representative. New business. Investment Accounts, Tax Free Savings Accounts, Retirement Annuities, Living Annuities, Pension and Provident Preservation Funds, Endowments.
Felicia	Risk	071 880 9576	Learner/Intern. Servicing attaching to Commercial Short-Term insurance,
Geraldine	Tax	083 754 1699	Head of tax division.
Liza	Wealth	071 850 1389	Production of Investment Statements
Luh	Bookkeeping	063 102 3313	Head of Bookkeeping Division. Professional Accountant (SA) SAIPA 30345
Nadean	Tax	063 026 1351	Intern. Administrator providing admin support to Bernelee and understudy to Bernelee.
Siso	Risk	060 376 6605	Learner. Starting to obtain some exposure to Short-Term insurance Medical Aids, GAP Cover and Life Insurance.
Stella	Risk	078 784 6462	Head of Short-Term Insurance Division.
Terisha	Books	071 858 3373	Intern. Bookkeeping Division. Data Capture and other functions relating to the bookkeeping Division.

Short-Term Insurer Contact Details over the Christmas Period

The numbers provided will be for underwriting changes (change of address, change of details, addition to your insurance, amendment to your insurance), as well as the number for the claims departments. Please keep your policy number at hand when making the call.

To all my clients, thank you so much for your valued support during 2020 and especially during this pandemic, that we have all had to face head on, but somehow managed coming out stronger and appreciating life more. May I take this opportunity to wish you and your family much love and happiness over the festive season and a happy, healthy, joyful, and of course a prosperous 2021!
Stella

Company	Contact Number	Department	Person
Auto & General	031 - 514 2200	Underwriting & Claims	Call Centre
HIC	011 – 455 5271	Underwriting & Claims	Ask for Relevant Department
MUA	031 - 275 8600	Underwriting & Claims	Ask for Relevant Department
Santam	0860 726 826	Personal Underwriting	Call Centre
	0860 505 911	Claims	Call Centre

SARS

If you receive correspondence from SARS between the 16th Dec and the 15th January demanding action within so many days “or else”, don’t panic. Why?

Because SARS, by way of a grace period, deem the days from 16 December to 15 January to be “non-business days”.

If for example you receive a notice from SARS saying you have 7 days to do “so and so” and the notice arrived during this period, then your 7 days starts on the 15th January of next year and not within 7 days of the date of the notice being received.

If you are a provisional taxpayer and become concerned that your final return has not yet been submitted to SARS, again, don’t panic.

The deadline for provisional taxpayers for submitting the final 2020 tax return to SARS via e-filing is the 29 January 2021.

LIVING ANNUITY INCOME PAYMENT DATES

Product Provider	Income Payment Dates
AIMS	15 th December 2020
Ninety One (previously known as 'Investec')	Between the 15 th & 18 th December 2020
Stanlib	Between 14 th & 16 th December 2020
Allan Gray	21 st December 2020
Coronation	23 rd December 2020
Old Mutual	Between 20 th & 23 rd December 2020