



2021 DECEMBER BREAK INFORMATION FOR CLIENTS

- Staff contact details (Emergencies only)
- Short-term Insurer Contact details
- Annuity Income Payment dates
- Tax Grace Period

| Staff | | | |
|-----------|----------------------|------------------------------|--|
| Name | Division | Cell Number | For queries relating to |
| Andrew | Wealth | 063 321 7399 | Medical Aids, GAP Cover, Long-Term Insurance |
| Andrisha | Wealth | 063 378 1473 | Investments |
| Ayanda | Bookkeeping | 063 102 3313 | Bookkeeping (Head of Division) |
| Bernelee | Tax | 078 708 4536 | Tax |
| Brady | Wealth | 071 843 3933 | Investments |
| Felicia | Short-Term Insurance | 071 880 9576 | Short-Term Insurance |
| Geraldine | Tax | 083 754 1699 | Tax (Head of Division) |
| Linda | Reception | 079 541 7512 or 031 916 4450 | General |
| Liza | Wealth | 078 842 9640 | Investments statements |
| Nadean | Tax | 063 026 1351 | Tax |
| Siso | Wealth | 060 376 6605 | Medical Aids, GAP Cover, Long-Term Insurance |
| Stella | Short-Term Insurance | 078 784 6462 | Short-Term Insurance (Head of Division) |
| Terisha | Bookkeeping | 071 858 3373 | Bookkeeping |

| Short-term Insurance | | | |
|----------------------|----------------|-----------------------|-----------------------------|
| Company | Contact Number | Department | Person |
| Auto & General | 031 514 2200 | Underwriting & Claims | Call center |
| 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 |

| Living Annuity Income Payment Dates | |
|---|---|
| Product Provider | Income payment dates |
| AIMS | 15 th December 2021 |
| Ninety One (previously known as 'Investec') | Between the 23 rd & 27 th December 2021 |
| Stanlib | 10 th December 2021 |
| Allan Gray | 21 st December 2021 |
| Coronation | 23 rd December 2021 |
| Old Mutual | Between 15 th & 28 th December 2021 |

SARS

If you receive correspondence from SARS between the 16th of December and the 15th of 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 16th of December to the 15th of January to be "non-business" days.

If for example you receive a notice from SARS saying that you have seven days to do "so and so" and the notice arrived during this period, then your seven days starts on the 15th of January of next year and not within the seven 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 to submit the final 2021 tax return to SARS via e-filing is the 28th of January 2022.