



Application for a Tax Directive: Gratuities and Two Pot Savings
Withdrawal Benefit

IRP3(a)

FOR OFFICE USE

Application no.

Tax Directive Reason

Date of accrual (CCYYMMDD)

Mark the applicable reason for the directive application request with an X:

Severance benefit – Death	Savings Withdrawal Benefit
Severance benefit – Retirement (Age of 55 or older)	Section 10(1)(gB)(iii) Compensation
Severance benefit – Retirement due to ill health	Employer owned policy proceeds - Taxable
Severance benefit – Involuntary retrenchment	Employer owned policy proceeds – Exempt section 10(1) (gG)
Severance benefit – Voluntary retrenchment	Severance benefit - Paid by a non-resident Employer
Other – Provide other reason and specify amount for each on the next page	Is the Employer registered in South Africa? Yes ☐ No ☐

Taxpayer Details

Taxpayer reference No.		Year of Assessment ended on (CCYY)	
Surname			
First Name(s)			
Initials		Date of Birth (CCYYMMDD)	
Passport/ Permit No.		Identity number	
Annual salary R		Passport Country / Country of Origin (e.g. South Africa = ZAF)	
		Employee number	

Taxpayer Details (continued)

[illegible]

Particulars of Employer \ Fund	
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Applicant Type:	Employer	Fund Administrator
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Fund create reason	Approved Fund		Public Sector Fund	
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PAYE Reference No.	7								
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[illegible][illegible][illegible][illegible]

FSCA Registration number of fund	1	2	/	8	/	0	0					/	0	0	0	0	0	0
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[illegible]

Note: If this is a Public Sector Fund – Either the FSCA Number or Fund Approval number must be completed

[illegible]

IRP3 (a)

Breakdown of Payment

Severance benefit payable (Excluding leave/notice payments)
Employer owned policy proceeds payable
Section 10(1)(gB)(iii) - Death compensation payable
Savings Withdrawal Benefit Amount

[illegible]

Other (Specify other payment separately)

[illegible][illegible]

Gross amount payable

[illegible]

Important Notes:

Directives are not transferable and a new application must be made following a change in the gross amount.

Leave Pay, Notice Pay and/or Arbitration / CCMA award may not be included in, but must be excluded from the amount reflected opposite Severance benefit payable.

The total amount in respect of Leave Pay, Notice Pay and/or Arbitration / CCMA award must be reflected separately under "Other" (Specify other payments separately below). A separate directive application must be submitted in respect of each.

Declaration

I declare that the information furnished is true and correct in every respect.

Date (CCYYMMDD)

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For enquiries go to www.sars.gov.za or
call 0800 00 7277

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