

# TaxTim



## TaxTim

Through TaxTim you will be able to file your tax return with confidence – quickly, easily, and correctly. The unique digital dialogue approach means it will ask you questions in plain English, without complicated tax terminology, helping you to better understand your tax return. Plus, the service integrates with SARS eFiling, which means that you can submit your tax return directly to SARS.

## Availability

- As a FundsAtWork Umbrella Fund member, you receive **one free TaxTim voucher valid from 1 July of one year to 30 June of the following year**, regardless of the tax season in which you redeem it. Once you redeem your first voucher, you can get a second one at a 25% discount.
- You can claim your free session by verifying your FundsAtWork membership with your ID number.

## How it works

1. **Register** on the TaxTim website, **taxtim.com**, by creating a user profile to start your journey.
2. Look for the Momentum logo during setup and enter your ID number.
3. Choose the TaxTim package that is most suitable for you.
4. You can link your SARS eFiling account to TaxTim to save time by importing your IRP5.
5. Answer simple questions online about your income and expenses. TaxTim uses your answers to complete your tax return instantly and professionally. At the same time TaxTim makes sure that you are claiming for all the deductions applicable to you and that your return meets the SARS compliance regulations.
6. Once completed, you can decide if you want to submit your tax return to SARS through TaxTim with just one click.
7. If you need any help along the way, you can ask the **TaxTim helpdesk**.

## To help you along the way

TaxTim has some insightful blog posts and resources that can help you.

- **Why you may owe tax on two-pot withdrawals**
- **Two-pot retirement system and its tax effects**
- **Two-pot calculator**

