

Given today's date (9 October 2025) the below 2025 Tax Season Checklist can assist you to take stewardship of your 2025 tax season:

Category	Task	Deadline	Status	Notes
Non-Provisional Individuals	Confirm auto-assessment accuracy on eFiling or MobiApp	10/20/2025	Not Started	Verify income and deductions match SARS data
Non-Provisional Individuals	Gather supporting documents (IRP5, medical aid, RA, etc.)	10/20/2025	In Progress	Keep all supporting documents for 5 years
Non-Provisional Individuals	Submit ITR12 return before 20 October 2025	10/20/2025	Completed	Late returns attract admin penalties
Provisional Taxpayers	Calculate first provisional tax payment (due 31 Aug 2024)	8/31/2024	Not Started	Based on estimated taxable income
Provisional Taxpayers	Submit second provisional tax payment (due 28 Feb 2025)	2/28/2025	In Progress	Ensure accuracy to avoid underpayment penalties
Provisional Taxpayers	Optional third top-up payment (due 30 Sept 2025)	9/30/2025	Not Started	Top-up if your income was higher than estimated
Provisional Taxpayers	Submit final ITR12 by 19 January 2026	1/19/2026	In Progress	Ensure all provisional payments are reconciled
Trusts	Prepare and finalise trust financial statements	1/19/2026	Not Started	Trustees must sign off statements before submission
Trusts	Submit ITR12T by 19 January 2026	1/19/2026	Completed	Nil return still required unless exempted by SARS
Trusts	Ensure Section 7C loan disclosures are correct	1/19/2026	Not Started	Review all trust loan agreements annually