

To ensure we have your latest details for SARS, we're renewing our view of you.



LIBERTY

Own your life.

Update your tax details

The Liberty Group (Liberty) is currently on a drive to update their client details and you may be contacted by a Liberty representative to obtain this information, *should your details be missing*.

There have been reports of scams in this regard in the media. However, this is a legitimate campaign emanating out of a **direct request from SARS** to furnish them with specific information for certain tax certificates.

Why this is important

This is a **regulatory requirement**, so Liberty cannot ignore it.

Failure to update the required client information for SARS will result in Liberty not being able to issue clients with tax certificates. This could delay tax submissions to SARS, and clients may therefore incur their own **financial penalties**. We would like to help you avoid any delays or penalties from SARS, so we would greatly appreciate it if you would help us in ensuring that your details are up to date.

Who this will affect

- Policyholders of **retirement annuities** and **income continuation policies** who receive contribution certificates from Liberty
- Policyholders **receiving interest** who obtain IT3(b)s from Liberty
- **Pensioners** or anyone else receiving **annuity payments** or **lump sums** who obtain IRP5s and IT3(a)s tax certificates from Liberty

We will contact you

Your financial adviser or a Liberty contact centre agent will contact you to gather any missing details required by SARS. We will contact you by phone, email or post between now and the end of June 2010.

We will only contact you if we need to update your details.

Should you be concerned in any way upon receiving a call from Liberty, please ask for a return contact number which should correspond to the Tax Contact Centre number below.

Let us know if you have questions

Should you have any queries, please contact us at the Tax Contact Centre:

Email: sarsinfo@liberty.co.za

Tel: 0860 776 323 (08h00 – 17h00)

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