ACTUARIAL SOCIETY OF SOUTH AFRICA

Advancing Actuarial Excellence

PERSONAL DETAILS AND DECLARATION FORM

ON PAYE DEDUCTIONS

Kindly complete the questionnaire below and indicate **YES** or **NO** to every one of the questions.

Provide any further explanation in the space provided, especially if the answer is "yes".

1. Is the service required from you by the Actuarial Society of South Africa ("**the Society**") mainly performed at the premises of the Society?	Yes / No
2. Are you subject to the control and supervision of the Society as to the manner in which the duties are to be performed or the hours to be worked? [*Please note that in considering your answer you need to assess (1) whether the Society is able to dictate your working hours and when the work must be performed; (2) whether the Society provides you with instructions on how the work must be performed, provides you with necessary training and monitors your performance. Please note that adherence to prescribes standards for quality assurance and to comply to legal and regulatory requirements may not necessarily be an indication that the manner the work is performed is controlled*]	Yes / No
3. Are you obliged to be present at the Society's premises during working hours, even when there is currently no work to do?	Yes / No
4. Are you restricted by the Society from building a multiple concurrent client base?	Yes / No
5. Do you personally render services to the Society on behalf of a trust or company (including a CC), in relation to which you are a connected person (e.g. a beneficiary or shareholder holding 20% or more of the shares or members' interest)?	Yes / No

If you answered **YES** to **ANY ONE** of questions 1, 2, 3 or 4 and you render services to the Society you are probably in an employment relationship with the Society.

The weekly, weekly or monthly tables (whichever is applicable) will be used by the Society to determine the amount of PAYE to be withheld. IRP5 tax certificates will be issued at the end of the tax year.

If you provide services to the Society for a period of less than 22 hours per full week for the duration of your contract, you are probably in a "non-standard employment" relationship with the Society. In this case your income will be subject to the deduction of PAYE at a flat rate of 25%. IRP5 tax certificates will be issued at the end of the tax year.

If you provide services to the Society for a period of less than 22 hours per full week for the duration of your contract and you provide the Society with a written declaration that you will not render services to any other employer, during the period of your contract you will/may be deemed to be in standard employment. The weekly, fortnightly and monthly tables (whichever is applicable) must be used to determine the amount of PAYE to be withheld. IRP5 tax certificates will be issued at the end of the tax year.

An exception to the above will apply if you employ three of more full-time employees who are on a full-time basis engaged in the business of rendering the service to the Society, other than any employee who is a connected person in relation to you e.g. a relative.

If you answered **YES** to question 5, the trust or company could possibly be a "**personal service provider**" for PAYE purposes, and you are requested to contact the Society to determine the entity's status for PAYE purposes and provide the declaration that will be provided by the Society.

If you answered **NO** to **ALL FIVE** of the above questions, you will probably be deemed to be an Independent Contractor for PAYE purposes, and no PAYE will be deducted. However, should you elect a voluntary deduction of PAYE, PAYE will be withheld at a rate not lower than 25%.

I hereby elect the voluntary deduction of PAYE from amounts due and payable to me from the Society:	Yes / No
I hereby elect the voluntary deduction of PAYE from amounts due and payable to me from the Society at the following rate:	_____%
If you would like PAYE deducted, please complete your Tax Refence Number: _____	

Banking Details:	
Bank	
Branch Code	
Account Name	
Account Number	
Account Type	

Personal Details:	
Surname	
Full Name	
Member number	

I hereby declare that the facts contained herein are within my personal knowledge and <u>are true and correct</u> and I shall inform the Society if anything in this declaration were to change at any future date, including banking details.

Signature: _____ **Date:** _____

For office use for new PAYE volunteers only:

ID Number	
Address	
Email	
Cellphone number	