

Changing conversations and unlocking opportunities from tax

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Problems & Challenges

- Cash flow and disposable income; i.e. NET income
- Tax has a significant direct impact
- Yet most ignore tax
- "Tax-Free" products

Cumber-
some

Grudge
Emotions

Time
Consuming

Complex

Low
Value

In the Financial Planning and Advice World...

Systems

**Advisers
don't use
tax to sell**

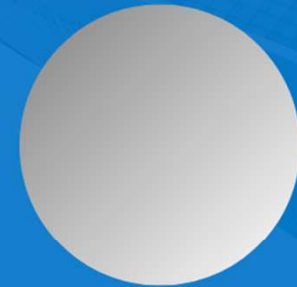
**Little
Attention**

**User
provided
%**

TWO AND
A HALF
DECADES



How do you
CHANGE
the conversation?



- Client > Product
- Client > Money
- Client > Self
- **Do the unexpected...**



IT IS NOT ABOUT...

- Saving tax...
- Maximizing your tax refund...
- Selling an RA...
- Not giving government a cent...



IT IS ABOUT...

- Enabling a worry-free retirement
- Making dreams come true
- Maximizing resources
- Learning secrets locked away in your SARS assessment
- Finding out what you don't know



HOW DO YOU GRAB ATTENTION?

- Make it about them
- Provide new and insightful info
- Paint a new better future



ASK GREAT QUESTIONS

- Have you ever felt like you might be leaving money on the table when it comes to your taxes?



ASK GREAT QUESTIONS

- Have you ever had a professional review your tax return to see if there are any missed opportunities?



ASK GREAT QUESTIONS

- Are you open to learning about new ways to reduce your tax liability?



ASK GREAT QUESTIONS

- Have you ever thought about how a few small changes to your tax strategy could have a big impact on your financial future?



ASK GREAT QUESTIONS

- Are you confident that you're taking advantage of all the tax-saving opportunities available to you?



THEN....

- Listen intently
- Be genuinely interested



Before Retirement - 3 examples (capital):

.Age 30

- .R 41 000 000 (not investing refund)
- .R 16 000 000 (investing refund)
- .R 57 000 000 (total)

.Age 40

- .R 17 500 000 (not investing refund)
- .R 6 800 000 (investing refund)
- .R 24 300 000 (total)

.Age 50

- .R 6 500 000 (not investing refund)
- .R 2 500 000 (investing refund)
- .R 9 000 000 (total)



Before Retirement - 3 examples (INCOME):

.Age 30

- .R 1 640 000 p.a. (not investing refund)
- .R 640 000 p.a. (investing refund)
- .R 2 280 000 p.a. (total)

.Age 40

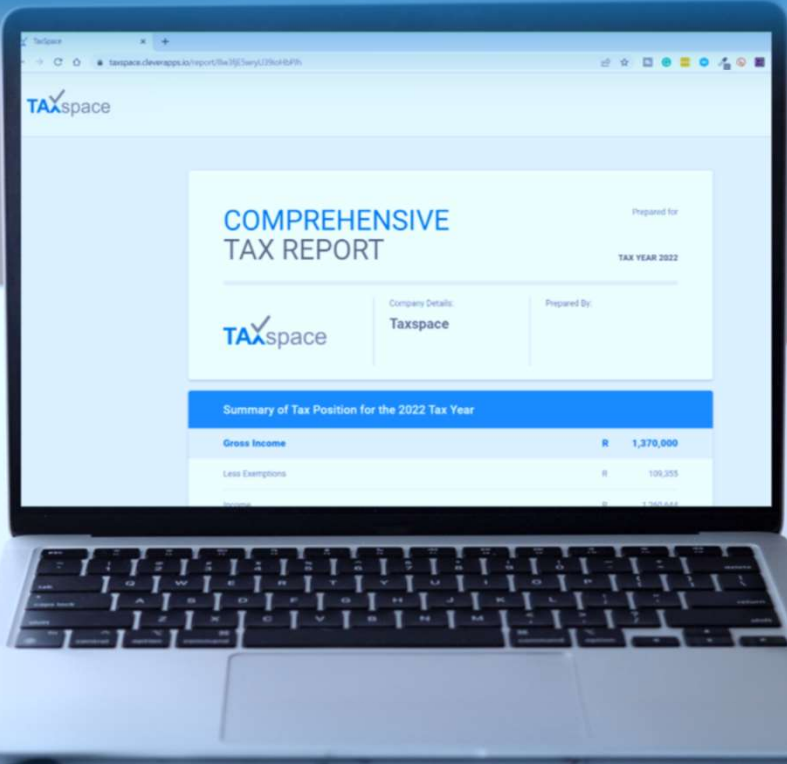
- .R 700 000 p.a. (not investing refund)
- .R 272 000 p.a. (investing refund)
- .R 972 000 p.a. (total)

.Age 50

- .R 260 000 p.a. (not investing refund)
- .R 100 000 p.a. (investing refund)
- .R 360 000 p.a. (total)



+ 39%



COMPREHENSIVE TAX REPORT

Prepared for
TAX YEAR 2022



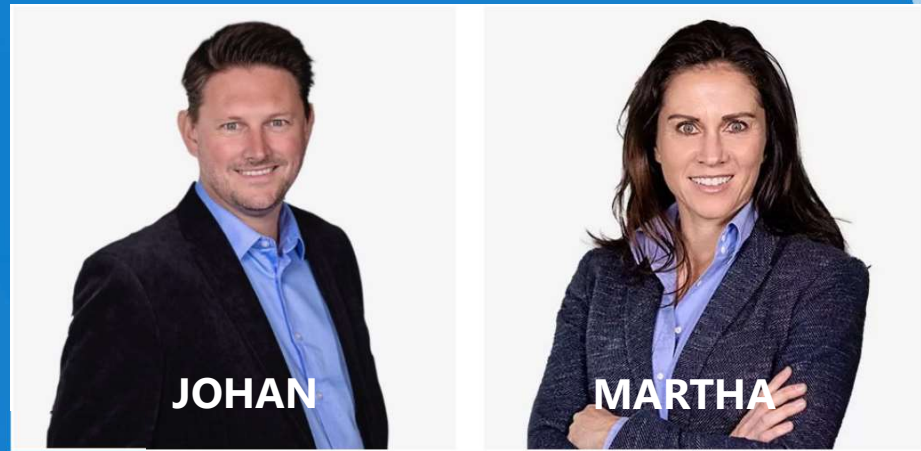
Company Details:
Taxspace

Prepared By:

Summary of Tax Position for the 2022 Tax Year

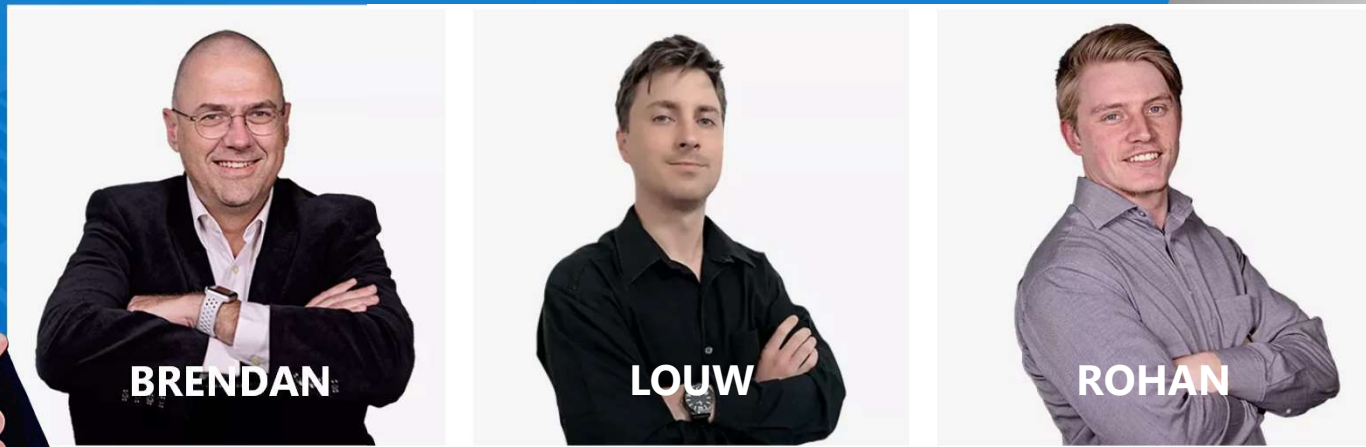
Gross Income	R	1,370,000
Less Exemptions	R	109,253

The POWER team who helped bring Taxspace to life



JOHAN

MARTHA



BRENDAN

LOUW

ROHAN

Who will benefit?

**Financial
Planners**

**Tax
Consul-
tants**

**Tax
Practi-
tioners**

**Accoun-
tants**

**Para-
planners**

**Financial
Advisers**

**Bookkeep-
ers**

Business Models

**Financial
Advice &
Tax
Services**

**Financial
Advice**

**Tax
Services**

**Strategic
"Partner-
ing"**



How Financial Advisers use the tool Investment and Retirement Planning

- Quickly determine after-tax income from multiple sources
- Determine best combination of compulsory and discretionary income sources
- Capture client's latest Tax Assessment into the tool to determine financial planning and investment opportunities
- RA season and adhoc client can invest for max tax benefit
- Determine correct effective tax rate to use when doing financial planning
- Determine the net return of an investment after tax
- Compare Guaranteed Investments vs Bank Investments
- And more!

How Financial Advisers use the tool

Business Growth

- Identify up to 9 opportunities for Financial Planning and Investment Planning
- Work with accountants, bookkeepers and tax practitioners

Training

TAXspace


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Introductory Training

- Introduction and logging in
- Main layout and general navigation**
- Adding and editing a client
- Adding a scenario and layout of the tool
- The tax assessment or ITA34
- The Gross Income section
- The Exemption section
- The Deductions section
- Travel Allowances
- Capital Gains section
- Medical Aid section

Main layout and general navigation

[Introductory Training > Main layout and general navigation](#)



Watch on YouTube

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Support

TAXspace Active Account: Juacois Consulting a Francois du Toit

My clients > Quick Overview

Find client... ADD CLIENT

Client: Tt Client Tt	Email Address: info@propulsion.co.za	Tax Number: 1234567890	ADD SCENARIO	1 Scenario(s) ⌵	⋮
Client: Francois Du Toit	Email Address: info@francoisdutoit.co.za	Tax Number: N/a	ADD SCENARIO	1 Scenario(s) ⌵	⋮
Client: Francois Tester	Email Address: info@propulsion.co.za	Tax Number: N/a	ADD SCENARIO	3 Scenario(s) ⌵	⋮
Client: Demo Person	Email Address: demo@person.co.za	Tax Number: N/a	ADD SCENARIO	1 Scenario(s) ⌵	⋮



Monthly Subscription Fee

R 390 per month ex VAT

Month-to-month

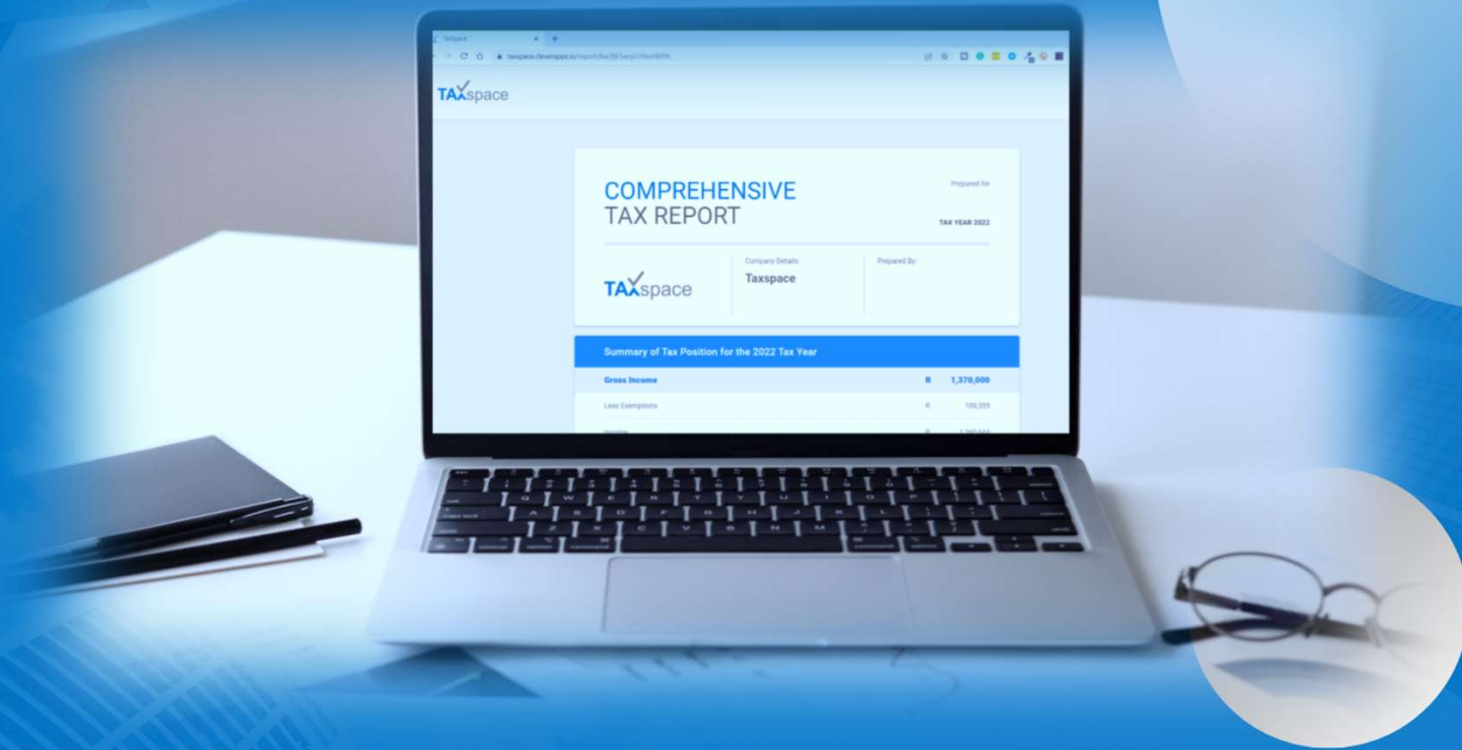
Manage from within the application



Special Pricing



Get your free 7-day trial



<https://app.taxspace.app/register>

The background is a solid blue color with faint, light blue geometric patterns. On the left, there are overlapping grid-like patterns. On the right, there are several circles of varying sizes and shades of blue and white, some with gradients. The overall aesthetic is modern and professional.

Questions?

francois@taxspace.app

<https://www.taxspace.app/>

Thank you

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