

TAX PROFESSIONAL PREPARATION COURSE

KNOWLEDGE COMPETENCY ASSESSMENT

JUNE 2017



Oxbridge
Training Institute
towards professionalism



1. OXBRIDGE TRAINING INSTITUTE (OTI) COMPANY BACKGROUND

OTI is a private training company, specialising in the field of financial training. OTI is an accredited service provider that, in line with the Government's National Skills Development Strategy, supports national and sectoral growth, development and equity principles.

The purpose of training is to ensure employees are adequately equipped to meet the requirements of their current positions and grow professionally.

OTI's intention is to develop a skilled, competent and confident workforce through training interventions that would equip and enhance the growth of the learner, their employer and society. We aim to achieve this through:

- nationally recognised and accredited learning programmes;
- needs analysis and relevance to business needs; and
- improved skills and work performance.

OTI's newly appointed General Manager was part of the development team of the Tax Professional Occupational Qualification and successfully registered the Qualification with the QCTO and subsequently the Learnership with the Department of Higher Education and Training (DHET). She was the Learner Facilitator as the DQP (Development Quality Partner) for the Tax Technician Occupational Qualification and successfully developed, implemented and registered the Qualification and Learnership.

2. TAX PROFESSIONAL PREPARATION COURSES

The purpose of the Tax Professional Preparation Courses is to ensure that learners are adequately equipped and prepared for the South African Institute of Tax Professional's (SAIT) Tax Professional Qualification Assessments.

The preparation courses integrate a more practical aspect to the preparation towards the Tax Professional Knowledge Competency Assessment (KCA) and Tax Professional External Integrated Summative Assessment (EISA), with contact sessions focussing mainly on exam technique and on doing practical questions, whilst also using the opportunity to revise key technical aspects.

OTI successfully presented the preparation courses for the SAIT KCA written in June and November 2016. The top achievers of both the KCA's attended OTI's preparation course. In June 2016, seven (7) learners attended the OTI preparation course of which over 80% of the learners were successful in the SAIT KCA. For the November 2016 KCA, twenty-four (24) learners attended the OTI preparation course of which fourteen (14) learners passed the SAIT KCA.

Furthermore, OTI presented the preparation courses for the EISA in July and November 2016. The learners also achieved great results. In July 2016, six (7) learners attended the OTI preparation course of which over 80% of the learners were successful in the SAIT EISA. For the November 2016 EISA, thirty-two (32) learners attended the OTI preparation course of which sixteen (16) learners passed the SAIT EISA.

OTI only appoints highly qualified tutors, mostly with a CA (SA) qualification and Master degrees in Taxation. All tutors work / have worked in the private sector for many years. By having top qualified staff, we ensure that we provide quality education to each learner.

The preparation courses are developed to empower and motivate the learners and are designed to the needs of a learner attempting the SAIT Assessments

- for the first time, or
- as a repeater.

2.1 COURSE STRUCTURE



The study information package consists of:

- the Tax Professional KCA preparation course recommended timetable that learners should follow;
- recordings and slide pack of the October 2016 Tax Professional KCA preparation course with an information letter as guidance to work through recordings and slide pack before formal 2017 Tax Professional KCA preparation course starts;
- the November 2016 SAIT KCA Papers.

This will enable learners to start early in the preparation for the June 2017 SAIT KCA and learners should work through the study information package prior to the commencement of the preparation course. This will ensure that learners are technically sound before the preparation course starts.

The November 2016 KCA Discussion Workshops are specifically designed to the needs of a learner attempting the SAIT Assessments for the first time or as a repeater. The workshop on 13 May for the learners that will be repeating the KCA, will focus on discussing the November 2016 KCA papers questions and solutions. Learners bring their own assessment papers, as obtained from SAIT, and individual questions will be addressed. The workshop on 27 May for learners attempting the KCA for the first time will focus on discussing the November 2016 KCA papers as case studies which the learners should come prepared to discuss their issues identified.

2.2 WHO SHOULD ATTEND AND WHY?

Learners who are preparing for the June 2017 SAIT Tax Professional KCA.

- Repeat learners should attend in order to understand key areas that were poorly answered during previous assessments.
- Expand learner's knowledge and deepen understanding of the key tax topics.
- Improve exam technique and skills to generate marks.
- Identification of relevant and practical issues.
- Motivation, planning and structure in preparing for the KCA.
- Online support from course tutor.

2.3 ADMINISTRATIVE ARRANGEMENTS

2.3.1 ENROLMENT

Enrolments are open for the Tax Professional Preparation Course from *Friday 17 March until close of business on Monday 3 April 2017*.

To enrol, please complete Annexure A: *Registration Form* and Annexure B: *Invoice Template*, as attached.

Payment must be made in full before commencement of the preparation course. Once proof of payment is received by OTI, learner registration will be confirmed.

2.3.2 VENUE FOR SATURDAY'S SCHEDULED CONTACT SESSIONS

Oxbridge Training Institute
Block A, Glen Gables Office Park
c/o Lynnwood Road and January Masilela Drive
Lynnwood Glen

2.3.3 TIME

9:00 – 14:00

2.3.4 MODE OF DELIVERY

Contact session classes. Distance learning support is available on request.

2.3.5 MODE OF INSTRUCTION

English.

2.3.6 COST PER LEARNER

R4 500 (incl VAT).

2.3.7 CATERING

Learners should bring their own snacks and lunch. Water, tea and coffee will be provided.

2.3.8 LEARNERS SHOULD BRING THE FOLLOWING TO THE CONTACT SESSIONS

- study information pack;
- pen and paper
- calculator
- any current published tax textbooks and Tax Acts
- recommended book: SILKE: South Africa Income Tax 2017
 Authors: Madeleine Stiglingh, Aletta Koekemoer, Linda van
 Schalkwyk, Jolanie Sune Wilcocks, Regianld Desmond de Swart
 Publisher: LexisNexis South Africa

3. CONTACT DETAILS

TAX PROGRAMMES MANAGER:

Contact person: Juanita Dolphin
Email: juanita@oxbridgetraining.co.za
Telephone number: 012 348 3888 / 072 372 1551

OTI GENERAL MANAGER:

Contact person: Ronel de Kock
Email: ronel@oxbridgetraining.co.za
Telephone number: 012 348 3888 / 082 459 0495

ANNEXURE A: REGISTRATION FORM

Personal Information												
Title:	Mr	Mrs	Miss	Ms								
Full Name (s):												
Surname:												
Date of Birth (day/month/year): / /												
Identification Number:												
Passport Number:												
Nationality:												
Citizen Status:												
Home Language:												
Second and or other language (s):												
Gender:	Male					Female						
Demographic background:		Black African					Coloured					
White			Indian					Other				
Disability (s):												

Physical Address			
No:	Street:		Suburb:
Town:		Province:	
		Area Code:	
Rural:		Urban:	

APPLICANT DECLARATION

(It is essential that this application form is completed correctly in all respects in order to be considered)

I confirm that the information in this application (or supporting it) is true and correct to the best of my knowledge and belief and I undertake to obey the terms and conditions as set out by Oxbridge Training Institute (OTI).

Name of Applicant	Applicant Signature	Date

Application forms should be emailed to:	Number: 012 348 3888 Email Address: juanita@oxbridgetraining.co.za
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Rules and Regulations

1. Payment must be made in full before the class commences.
2. Proof of payment must be sent to OTI via email to juanita@oxbridgetraining.co.za
3. After OTI has received payment, a confirmation email will be sent.
4. The fee stays the same, irrespective of the amount of days you attend.
5. Oxbridge Training Institute reserves the right to refuse admission to a course, in which case the applicant will be informed and applicable fees will be refunded.
6. Cancellations are accepted in writing and without penalty up to 7 days prior to the course start date. Notification of cancellation must be submitted in writing either via email to juanita@oxbridgetraining.co.za .
7. Applicants who cancel outside the approved cancellation period would not be entitled to any refunds unless the applicant is unable to attend as a result of reasons such as hospitalisation which in the sole discretion of Oxbridge training institute renders it impossible for the applicant to attend.

Company Information – Oxbridge Training Institute (OTI)

Contact Person: Juanita Dolphin
 Contact Number: 012 348 3888
 Email: juanita@oxbridgetraining.co.za
 Address: Block A, Glen Gables Office Park
 c/o Lynnwood Road and January Masilela Drive
 Lynnwood Glen

Banking details

Investec Private Business Account

Account number: 10011789845

Branch Name: Sandton

Branch Code: 580105

Reference: Tax & ID Number (Tax 8803132285214)

- Proof of payment need to be sent to juanita@oxbridgetraining.co.za
- Once proof of payment has been received and verified, your place will be reserved

ANNEXURE B: INVOICE TEMPLATE

Complete the invoice template from OTI.

Include all the information of the company or person that will be responsible for payment of the invoice.

Please send it back after completion, with your registration form.

	Description	Information
1.	Customer name (e.g. XY Company (Pty) Ltd)	
2.	Name of contact person	
3.	Customer VAT number	
4.	Customer's physical and or postal address	
5.	Reference number or purchase order number	
6.	The description of the items to be invoiced as well as the amounts (ex VAT)	
7.	Amount of goods/ learners to be invoiced	
8.	TOTAL (Excluding VAT)	
9.	VAT	
10.	TOTAL (Including VAT)	