



TAX PROFESSIONAL PREPARATION COURSE

EXTERNAL INTEGRATED SUMMATIVE ASSESSMENT
NOVEMBER 2017



1. **BACKGROUND TO OXBRIDGE TRAINING INSTITUTE (OTI)**

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 that 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 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 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.

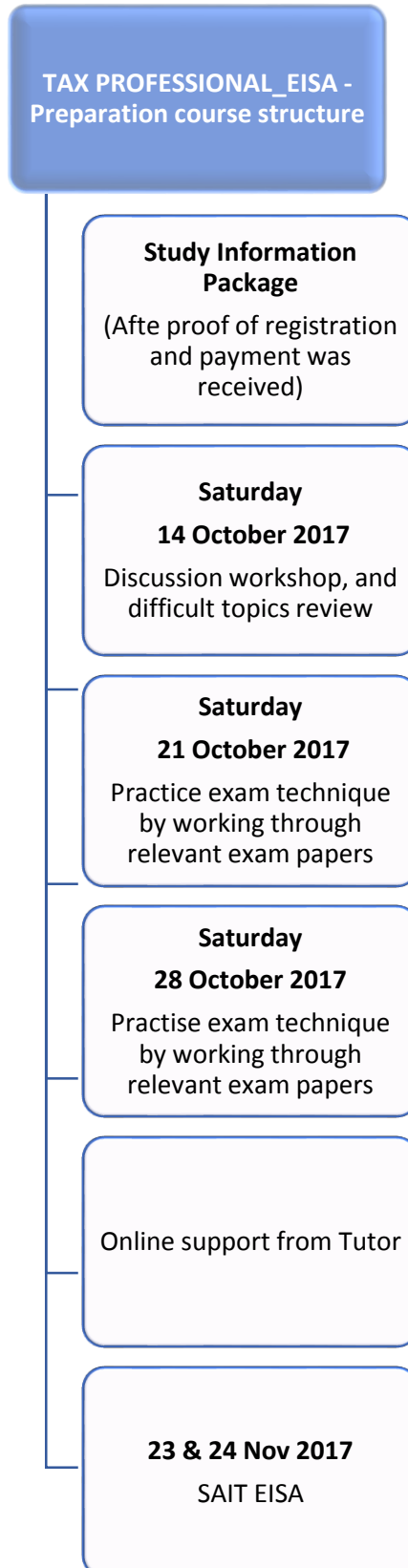
Furthermore, OTI presented the preparation courses for the EISA in July and November 2016. The learners also achieved great results. In July 2016, six (6) learners attended the OTI preparation course of which over 80% of the learners were successful in the SAIT EISA. For the November 2016 EISA, thirty-two (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 a Masters' degree 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 EISA preparation course recommended timetable that learners should follow;
- recordings and slide pack of the November 2016 Tax Professional EISA preparation course with an information letter as guidance to work through recordings and slide pack before formal 2017 Tax Professional EISA preparation course starts;
- SAIT EISA exemplar papers.

This will enable learners to start early in the preparation for the November 2017 SAIT EISA. Learners should work through the study information package prior to the commencement of the preparation course. *We recommend that each learner work through all the topics according the Tax Professional Curriculum.* This will ensure that learners are technically sound before the preparation course starts.

Learners will also receive the Tax Professional EISA exam paper for November 2016 to attempt before the preparation course. The November 2016 Exam paper will be discussed during the first contact session.

2.2 WHO SHOULD ATTEND AND WHY?

Learners who are preparing for the November 2017 SAIT Tax Professional EISA Exam.

- Learners should attend in order to understand key areas of assessment
- 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 EISA
- Online support from course tutor

2.3 ADMINISTRATIVE ARRANGEMENTS

2.3.1 Enrolment

Enrolments are open for the Tax Professional Preparation Course from *Tuesday, 08 August 2017 until close of business on Thursday, 28 September 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
0081

2.3.3 Dates of Preparation course

- Saturday, 14 October 2017
- Saturday, 21 October 2017, and
- Saturday, 28 October 2017

2.3.4 Time

9:00 – 14:00

2.3.5 Mode of delivery

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

2.3.6 Mode of instruction

English.

2.3.7 Cost per Learner

R4 500 (incl VAT).

2.3.8 Catering

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

2.3.9 Learners should bring the following to the contact sessions

- Learner's attempt of the November 2016 EISA
- 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 Syl,
Jolanie Wilcocks, Redge de Swart
Publisher: LexisNexis South Africa

3. CONTACT DETAILS

TAX PROGRAMMES MANAGER:

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