

CHECKLIST PERSONAL INCOME TAX 2021

PERSONAL INFORMATION

Please provide us with a copy of your identification.

Your personal details

Your data

Full name and family name : _____

Address : _____

Postcode and city : _____

Telephone number (private) : _____

Telephone number (work)/mobile : _____

E-mail address : _____

BSN (Burgerservicenummer) : _____

Date of birth : _____

Bankaccount number : _____

Spouse/partner

Full name and family name : _____

Address : _____

Postcode and city : _____

Telephone number (private) : _____

Telephone number (work)/mobile : _____

E-mail address : _____

BSN (Burgerservicenummer) : _____

Date of birth : _____

Bankaccount number : _____

Marital status : _____

Children

Do you have any children that live at home? Please provide their initials, their dates of birth and their BSN.

Initial(s) Date(s) of birth Burgerservicenummer(s) (BSN)

Initial(s)	Date(s) of birth	Burgerservicenummer(s) (BSN)

Income from employment and other income (pensions et cetera)

- Income from employment.
- Benefits (unemployment, other social benefits).
- Pensions or life annuity, subject to wage tax.

If any one or all of the above are applicable, please provide us with the yearly fiscal overviews. Please also provide us with a statement from either your employer or the Dutch tax administration if the 30% ruling is applicable.

Other income

Did you have, apart from income from employment, any other income such as income from free lance activities, carried interest or did you provide any assets to a company?

Please provide us with an overview and a specification of the following:

- income received;
- costs incurred.

Alimony

Did you receive or pay any alimony?

• Amount received (not the amount received for any children) : € _____

Received from or paid to : _____

House

If you own and live in a house, please provide us with the following details.

- Value according to the *WOZ* statement from the council : € _____
(Value reference date 1 January 2020)
- Mortgage interest paid : € _____
- Overview of your mortgage : € _____
- Paid ground rent : € _____

If you bought a house in 2021, please provide us with the following details.

- A copy of the notary's invoice. € _____
- Copy of the taxation costs. € _____
- Since when do you live in your new home? _____
- Other costs regarding your mortgage. _____

Savings and investments, receivables and liabilities (domestic and foreign)

Bank accounts, receivables and other assets: the value per January 1, 2021

- The value of all bank accounts.
- The value of all other receivables.

Shares, bonds and other investments

- An overview of the value of your investments per January 1st 2021.
- The amount of withholding tax paid on dividends (domestic and foreign).
- The value of any endowments per January 1st 2021.
- Please specify any venture capital and social investments. Tax breaks may apply.

Other assets

- Second house or other real estate (domestic and foreign).
- Boats, caravans, art collections et cetera.

Liabilities and debts

- An overview of the value of any debts and other liabilities.