

CHECKLIST PERSONAL INCOME TAX 2023

PERSONAL INFORMATION

Please provide us with a copy of your identification.

Your personal details

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 BSN.

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

EMIGRATION AND IMMIGRATION

Date of emigration or immigration?

Nationality?

Land of emigration or immigration?

30% ruling?

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 January 1, 2023) €
- Mortgage interest paid (2023) €
- Overview of your mortgage €
- Paid ground rent €

If you bought a house in 2023, 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, 2023

- 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 1, 2023.
- The amount of withholding tax paid on dividends (domestic and foreign) over the year 2023.
- The value of any endowments per January 1, 2023.
- Please specify any venture capital and social investments. Tax breaks may apply.

Other assets

- Second house or other real estate (domestic and foreign).

Liabilities and debts

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