Income Tax Return 2024

Please fill in the personal information and send (Gorslaan 12, 1441 RG PURMEREND)
or mail (info@finconcept.nl) this along with the necessary documents

Personal information

	Cliënt	Partner
Full name		
Gender		
Nationality		
Date of birth		
BSN		
Address		
Postal code + City		
Telephone		
E-mail		
30% ruling? (send copy)	Yes / No	Yes / No
Marital status Status changed in 2024?	Married / Living together with contract (copy contract) / Living together without contract / Single / Divorced (copy settlement)	
	Yes/No	Date of the change:

Did you live in NL the whole year?
(EXACT DATE)*
	Yes
	No, namely
	   In (country): …………………
	   Period in Holland: ……….
		Yes
		No, namely
		   In (country): ………………
		   Period in Holland: …….

Name Children	Date of birth	BSN

- *It is important to know since the exact date of (de)registration with municipality upon entering of leaving*

Documents (copy)

Income

❖ Year statement(s) employer(s) but also Transition, Pension / WW / WIA (UWV): AOW (SVB)

❖ Overview other income: freelance (also deductible expenses)

❖ Received (Partner-) Alimony (amount and personal information like BSN, name, address)

❖ Travel by **public transport**: OV / Travel – declaration / (send along)

❖ One way Distance, if more than 10km [**km**]. Number of days a week [   ] .

❖ We also need an overview of the received benefits of travel by employer

Own house

❖ Overview WOZ value (of date <u>1-1-2023 = peildatum</u>).

❖ Annual statement of paid mortgage <u>2024</u>.

❖ Erfpacht: overview of payments (<u>annual canon 2024</u>)

❖ Overview temporarily rent or income (for example AIRBNB, floor, room)

❖ Special things (gift, two houses, family loan, divorce)

Moved in 2024 to another house or Increased or other change of mortgage

❖ Statement of account from the notary (buy and sale)

❖ Exact date of relocation .. - .. - …. (according to GBA)

❖ Overview costs (improvement) of the own house.

Property, savings and investments

❖ Year statement(s) investment(s) <u>also foreign accounts</u> (<u>1-1-2024</u>)

❖ Year statement(s) bank account(s) <u>also foreign</u> accounts (<u>1-1-2024</u>)

❖ Statements paid dividend and tax payments

❖ Other assets as crypto, claims, etc. (value <u>01-01-2024</u>)

❖ Overview other property (other house, apartment or real estate), also in other country (value <u>01-01-2024 or</u> <u>woz-value 2023</u>) If rented, please send a copy of the rental contract.

❖ Statements other mortgages

❖ Statements other debts (<u>1-1-2024</u>)

Personal tax deductions

❖ Payed alimony:

  o ex-partner (<u>name + BSN + date of birth + address</u>)

❖ Heath costs: <u>not</u> payed by the Insurance company, <u>not</u> own risk. (in case of high costs)

❖ Overview gifts / donations (ANBI)

Other tax deductions

❖ Statement Annuity ('lijfrente') Insurance or Bank (payments <u>2024</u>).

❖ Pension: pension growth <u>2023 (factor A)</u> + income statement <u>2023</u>.

❖ Statement 'incapacity for work insurance' (premium payments).

Tax return / allowance

❖ Statement tax return <u>2024</u> (monthly refund).

❖ Allowance <u>2024</u>, Health, Rent or Child (= Zorgtoeslag, huurtoeslag of kindgebonden budget)

Other Information (PLEASE CONTACT US FIRST)

- ❖ BOX 2 Name of the company + annual figures (BV, limited, etc.)
- ❖ Started an own company (ZZP)
- ❖ Received an inheritance
- ❖ Divorced or separated with partner in 2023 or 2024
- ❖ Emigration or immigration in 2024

The tax return is only been taken care of if:

1. You give a complete overview
2. You filled in and signed this checklist completely

Any specific question:

I declare that I filled in this checklist completely and delivered all required documents.

I give permission to send in the tax return electronically to the belastingdienst.

Signature: …………………..   Signature Partner   …………………..

Place   …………………..

Date   …………………..

Personal Data

In the context of taking care of the income tax return, we will process various personal details of you. We only process the data required for the execution of the assignment and will store the required data. You accept this by signing this form. If you believe that we do not process your personal data in accordance with the prevailing privacy legislation, we ask you to report this to us.