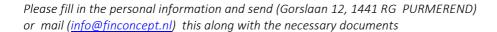
Income Tax Return 2024





Personal information

	Cliënt	<u>Partner</u>
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	Married / Living together with contract (<u>copy contract</u>) / Living together without contract / Single / Divorced (<u>copy settlement</u>)	
Status changed in 2024?	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	e the exact date of (de)registration with municipali	ty upon entering of leaving
Documents (copy)		
Income		
Voar statement(s) omr	playor(s) but also Transition Pansion / M	/\\/ /\\/\\ /\\/\\\\\\\\\\\\\\\\\\\\\\

- Year statement(s) employer(s) but also Transition, Pension / WW / WIA (<u>UWV</u>): AOW (<u>SVB</u>)
- Overview other income: freelance (also deductible expenses)
- Received (Partner-) Alimony (amount and personal information like BSN, name, address)
- Travel by <u>public transport</u>: <u>OV / Travel declaration</u> / (send along)
- We <u>also need</u> an overview of the received benefits of travel by employer

Own house

- Overview WOZ value (of date 1-1-2023 = peildatum).
- Annual statement of paid mortgage 2024.
- Erfpacht: overview of payments (annual canon 2024)
- 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 (1-1-2024)</u>
- Year statement(s) bank account(s) also foreign accounts (1-1-2024)
- Statements paid dividend and tax payments
- Other assets as crypto, claims, etc. (value 01-01-2024)
- Overview other property (other house, apartment or real estate), also in other country (value <u>01-01-2024 or woz-value 2023</u>) If rented, please send a copy of the rental contract.
- Statements other mortgages
- Statements other debts (1-1-2024)

Personal tax deductions

- Payed alimony:
 - o ex-partner (<u>name + BSN + date of birth + address</u>)
- Heath costs: not payed by the Insurance company, not 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 2023 (factor A) + income statement 2023.
- Statement 'incapacity for work insurance' (premium payments).

Tax return / allowance

- Statement tax return 2024 (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 doclare that I filled in	this chacklist com	npletely and delivered all required documents.	
Tueciale that I illeu ill	tilis checklist com	ilpletely 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.

