



WHICH INFORMATION DO I NEED TO PROVIDE?

- ▶ We can only file your Dutch Tax forms completely and correctly if you provide the following documents and information
- Printed and on paper!**
- ▶ If you do not have this information with you it may be necessary to make another appointment
- ▶ Do not forget to take your **“machtigingscode”** and the one of your partner (when applicable).

SITUATION

WHAT IS NEEDED

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| 1. Filing Taxes | <ul style="list-style-type: none"> <input type="checkbox"/> Proof of membership of the FNV, and a recent proof of payment. <input type="checkbox"/> Copy of your 2022 tax form including related papers. <input type="checkbox"/> “Machtigingscode inkomstenbelasting (en toeslagen) 2023”.
Request the code: call 088 – 123 65 55 or via https://machtigen.digid.nl <ul style="list-style-type: none"> • If you have a partner, you also need a code for him/her. • Without the correct “machtigingscode” we cannot file taxes for you. <input type="checkbox"/> All documents received in 2023 from the Tax Office (“Belastingdienst”): <ul style="list-style-type: none"> • Correction letters, preliminary (“voorlopige”) and final Tax Bill / Assessment (“Aanslag”), statement preliminary return (“Voorlopige Teruggave”). • Statements about (returned) allowances (“Toeslagen”), like health care allowance (“Zorgtoeslag”) and “kindgebondenbudget” 2023. <input type="checkbox"/> <i>Important</i> data in 2023 – <ul style="list-style-type: none"> • Living together, marriage, decease, • Date of request for divorce to the courthouse,
Date entrance or exit with the municipality (GBA). |
| 2. Income from work or benefits | <ul style="list-style-type: none"> <input type="checkbox"/> Yearly statements (“Jaaropgaven”): salaries, benefits, pensions, etc. (both Dutch and foreign). If not available, your last payment slip. <input type="checkbox"/> Specification termination benefit/ transition payment. |
| 3. Commuting with Public Transport | <ul style="list-style-type: none"> <input type="checkbox"/> OV-declaration or travel-declaration (“reisverklaring”) of the employer. <input type="checkbox"/> Overview of transactions with the ov-chipkaart. |
| 4. Income from other activities | <ul style="list-style-type: none"> <input type="checkbox"/> Overview of: revenues / related costs / travel expenses / travel km. |
| 5. Owned house(s) or other real estate | <ul style="list-style-type: none"> <input type="checkbox"/> WOZ-statement of the municipality – value on January 1, 2022. <input type="checkbox"/> Mortgage: paid interest in 2023, debts on January 1 and December 31, 2023 – Mortgage-separation (“hypotheeksplitsing”) calculated in previous years. <input type="checkbox"/> When a house has been sold and/or purchased in 2023: <ul style="list-style-type: none"> all bills from Notaries, Taxations, Financial Advisor and possible other costs related to the selling or purchase. <input type="checkbox"/> When a house is located outside the Netherlands: <ul style="list-style-type: none"> Economic value on Januari 1, 2023. <input type="checkbox"/> Other mortgage-related costs (e.g. refinancing) |
| 6. Bank accounts/Savings accounts | <ul style="list-style-type: none"> <input type="checkbox"/> Balance on January 1, 2023 (both Dutch and foreign accounts) of all accounts (including under-age children). <input type="checkbox"/> Balance on January 1, 2023 of all debts. > |

SITUATION**WHAT IS NEEDED (Continued)**

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| 7. | Investments and other assets | <input type="checkbox"/> Value of the investments on January 1, 2023 (both Dutch and other investments).
<input type="checkbox"/> Withheld dividend tax
<input type="checkbox"/> Value of your part of the VvE account on January 1, 2023
<input type="checkbox"/> Value of other financial assets |
| <hr/> | | |
| 8. | Capital Insurances (“Kapitaalverzekeringen”) | <input type="checkbox"/> Value on January 1, 2023 – policy document (“polisblad”) containing information on when, for how long and for which purpose this insurance has been entered into.
<input type="checkbox"/> When applicable information related to the preliminary termination. |
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| 9. | Life annuity | <input type="checkbox"/> Payments – policy document (“polisblad”) containing information on when, for how long and for which purpose this insurance has been entered into.
<input type="checkbox"/> Formal pension fund overview (“Uniform pensioenoverzicht”) with Factor A of 2022.
<input type="checkbox"/> When applicable information related to the preliminary termination. |
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| 10. | Alimony | <input type="checkbox"/> Received and/or paid amounts from/to ex-partner |
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| 11. | Charitable donations | <input type="checkbox"/> Provable (<i>bank statements</i>) paid amounts to charities, church organisations, etc.
<input type="checkbox"/> For periodic donations: the related contract (<i>incl. transaction number!</i>). |
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| 12. | Health-related costs | <input type="checkbox"/> Paid amounts, not refunded by health insurance
For instance: dentist, physiotherapist, appliances.
<input type="checkbox"/> <i>Important</i> : costs within your own risk (“eigen risico”) or by law defined as own contributions (“wettelijke eigen bijdragen”) cannot be deducted.
<input type="checkbox"/> Diet declaration (“dieetverklaring”) 2023. |
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| 13. | Travel costs for illness/disability | <input type="checkbox"/> Own transport (car): all related costs in 2023.
• Number of km driven to hospital/specialists etc. in 2023.
<input type="checkbox"/> When using public transport and taxi: the paid amounts. |
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| 14. | Costs of temporary stay at home of handicapped 21 years or older | <input type="checkbox"/> Number of days the handicapped person(s) is/were at home in 2023.
<input type="checkbox"/> Number of kilometres travelled to pick up or return the handicapped person |
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