

Checklist For The Dutch Personal Income Tax Return

General information

Your name : _____
Your date of birth : _____
Your nationality : _____
Your BurgerServiceNummer (BSN) : _____
Your current address : _____

- Name, date of birth and BSN of your fiscal partner (if any) : _____

- Initials and dates of birth of your children living with you : _____

- Migration date in case you entered or left the Netherlands during the year : _____
- If you entered or left the Netherlands during the year:*
Date of (de)registration at the Dutch Municipality : _____
- Country where you lived prior to your move to the Netherlands : _____

- Copy of valid ID
- Tax Authorities' notice to file a tax return (if issued)
- Copy of the prior year's Dutch personal income tax return (unless, we helped you filing this)
- Copy of your 30%-ruling (if applicable)

Salary and other income

- Year-end statement (jaaropgaaf) from employer(s) and/or benefit agency
- Overview of income and expenses (e.g. freelance work)
- Overview of alimony received (if any, please provide the contact details of your ex-partner)
- Overview of premiums paid for disability insurance or additional retirement plans
- In case you emigrated, the surrender value of your pension and life annuity rights as per emigration date (to be provided by the pension fund or insurance company)
- If you entered or left the Netherlands in the tax year* : _____
Income earned in the period prior to/after your move to/from the Netherlands € _____

Questions? Please feel free to call at +31 (0)85 30 32 937 or send an [e-mail](#) message

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If you own a house

- The WOZ value statement from the Municipality
- Annual overview of the mortgage interest payments and the outstanding mortgage loan
- Overview other debt interest payments relating to your house
- Overview of the land lease payments (*erfpacht*)
- Provisional tax assessment (*voorlopige aanslag*) of monthly interest rebates received, if applicable

If you bought or sold a house during the year

- Notary invoice/statement
- Overview of the mortgage loan (bank statement)
- Overview of the expenses relating to home improvement
- Statement *eigen woningreserve* (if applicable)

Tax deductible expenses

- Overview of the healthcare expenses not covered by medical insurance, e.g. dentist, medications etc.
- Overview of alimony paid (please provide the contact details of your ex-partner)
- Overview of donations to charities

If the value of your (worldwide) savings and investments exceeds € 50,650 (or € 101,300 if you have a fiscal partner) on January 1 and you do not benefit the 30%-ruling

- Annual overview of bank accounts in the Netherlands and abroad indicating the value on January 1
- Annual overview of (worldwide) stocks, bonds and other securities indicating the value on January 1
- Overview of loans and debts
- Overview of policies capital insurance (*kapitaalverzekeringen*)
- (WOZ) value of property located in or outside the Netherlands, not being your main residence

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