

CHECKLIST INFO FOR 2017 DUTCH PERSONAL INCOME TAX RETURN

GENERAL INFORMATION

- ✓ Copy of valid ID
- ✓ Tax authorities' notice to file a return (if issued)
- ✓ Copy of your 30%-ruling
- ✓ Copy of your Certificate of Coverage (E101)
- ✓ Initials and dates of birth of your children living with you



FISCAL DATA

- ✓ Copy of the 2016 tax return (unless we helped you filing this)
- ✓ Preliminary tax assessment 2017
- ✓ Immigration date: if you entered or left the Netherlands in 2017: exact date of (de-)registration with municipality upon entering or leaving



SALARY & OTHER INCOME

- ✓ 2017 year-end statement ('jaaropgave'), employers and benefits agencies
- ✓ Overview income and expenses (e.g. freelance work)
- ✓ Overview alimony received (if any, please provide the contact details of your ex-spouse)
- ✓ Overview premiums paid for disability insurance or additional retirement plans



IF YOU HAVE TOTAL SAVINGS / INVESTMENTS ABOVE €25,000

- ✓ Annual overview of bank accounts in the Netherlands and abroad
- ✓ Annual overview of stocks, bonds and other securities
- ✓ Overview of any other assets, claims
- ✓ Overview of loans and debts
- ✓ Overview of policies 'kapitaalverzekeringen'
- ✓ (WOZ-)value of property located in or outside of the Netherlands, not being your main residence
- ✓ **All items: value per 1-1-2017 is relevant**



IF YOU OWN A HOUSE

- ✓ WOZ-value-statement from the municipality per January 1, 2016
- ✓ Annual overview mortgage interest payments
- ✓ Overview other debt interest payments relating to your house
- ✓ Overview of 2017 land lease payments ('erfpacht') (if applicable)



IF YOU BOUGHT OR SOLD A HOUSE

- ✓ Notary invoice/statement
- ✓ Invoices from realtors / apprais
- ✓ Overview mortgage bank
- ✓ Overview expenses relating to home improvement
- ✓ Statement 'eigen woningreserve' (if applicable)



TAX-DEDUCTIBLE EXPENSES

- ✓ Overview of healthcare expenses not covered by medical insurance, e.g. dentist, medication, etc.
- ✓ Overview of educational expenses you paid yourself, e.g. tuition fees, books, etc.
- ✓ Overview of alimony paid (please provide the contact details of your former spouse)
- ✓ Overview of donations to charities



Please note: if you have a spouse or fiscal partner, we will also need the information mentioned above for your spouse or fiscal partner

Questions? Call 020-8208340 or [e-mail!](#)