

## 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 € .....

### 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

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 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 educational expenses you paid yourself, e.g. tuition fees, books, 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 € 30,360 on January 1**

- 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