

# Tax Return 2011

Please fill in the personal information and send (Postbus 201, 1440 AE PURMEREND) or mail ([info@finconcept.nl](mailto:info@finconcept.nl)) this along with the necessary documents (we charge € 90)



**Finconcept**

GESPECIALISEERD  
IN PERSOONLIJKE  
FINANCIËLE PLANNING

## Personal information

	<u>Cliënt</u>	<u>Partner</u>
Full name		
Gender		
Nationality		
Date of birth		
BSN/Sofinumber		
Address		
Postal code + City		
Telephonenumber		
Email address		
Dutch bank account		
30% ruling?	Yes / No	Yes / No
Marital status	Married / Living together / Single / Divorced / Widow(er)	
Status changed in 2011?	Yes/No	Date of the change:
Did you live in NL this year?	Yes No, namely In (country): ..... Period in Holland: .....	Yes No, namely In (country): ..... Period in Holland: .....
	<u>Children</u>	
Name		
Date of birth		
BSN/Sofinumber		
Name		
Date of birth		
BSN/Sofinumber		

- It is important to know since when (date) you are registered on the same address.

## Documents:

### **Income**

- ❖ Year statement(s) employer(s) (also pension / AOW / WW / WIA).
- ❖ Overview other income: freelance / alimony.

### **Own house**

- ❖ Overview WOZ value (of date 1-1-2010).
- ❖ Year statement mortgage.
- ❖ Erfpacht: overview of payments.

### **Moved to another house or Increased or other change of mortgage**

- ❖ Statement of account from the notary (buy and sale).
- ❖ Overview costs (improvement) of the own house.
- ❖ The valuer's fee showing the costs to create the valuation report.

GORSLAAN 60 • 1441 RG PURMEREND • POSTBUS 201 • 1440 AE PURMEREND

TELEFOON: 0299 46 55 11 • FAX: 0299 77 55 50 • E-MAIL: [INFO@FINCONCEPT.NL](mailto:INFO@FINCONCEPT.NL) • [WWW.FINCONCEPT.NL](http://WWW.FINCONCEPT.NL)

KVK NR.: 37099939 • BANKRELATIE: ABN AMRO 51 95 86 417 • AFM VERGUNNING VERLEEND ONDER NR 12012452



**Finconcept**

GESPECIALISEERD  
IN PERSOONLIJKE  
FINANCIËLE PLANNING

### **Property, savings and investments**

- ❖ Year statement(s) investment(s) (1/1 and 31/12)
- ❖ Year statement(s) bank account(s). (1/1 and 31/12)
- ❖ Statements dividend tax payments.
- ❖ Overview other property (other houses or buildings).
- ❖ Statements other mortgages.
- ❖ Statements other debts.

### **Personal tax deductions**

- ❖ Payed alimony:
  - child (name + date of birth)
  - ex-partner (name + date of birth + address)
- ❖ Health costs: not paid by the Insurance company (not your own risk).
- ❖ Health costs: prescribed by a doctor (medicijnen, hulpmiddelen, dieet, therapie).
- ❖ Health costs: transport visits.
- ❖ Overview costs for study (more then € 500,-).
- ❖ Overview gifts/donations (ANBI)

### **Other tax deductions**

- ❖ Statement Dutch 'lijfrente' Insurance or Bank (policies + premium payments).
- ❖ Pension: pension growth 2010 (factor A) + statement employer 2010.
- ❖ Statement 'incapacity for work insurance'.

### **Tax return/allowance**

- ❖ Statement tax return 2011 (monthly refund).
- ❖ Allowances health, hire or child (= Zorgtoeslag, huurtoeslag of kindgebonden budget)

Your tax return is only been taken care of if:

1. You give a complete overview
2. You filled in and signed this checklist completely

I declare that I filled in this checklist completely and delivered all required documents.

**I give permission to send in the tax return electronically to the belastingdienst.**

Signature: .....

Place .....

Date .....