

Income Tax Return 2020

Please fill in the personal information and send (Postbus 201, 1440 AE PURMEREND) or mail (info@finconcept.nl) this along with the necessary documents



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Personal information

	<u>Cliënt</u>	<u>Partner</u>
Full name		
Gender		
Nationality		
Date of birth		
BSN		
Address		
Postal code + City		
Telephone		
E-mail		
Bank account (IBAN)		
30% ruling? (send copy)	Yes / No	Yes / No
Marital status	Married / Living together with contract (<u>copy contract</u>) / Living together without contract / Single / Divorced (<u>copy settlement</u>)	
Status changed in 2020?	Yes/No	Date of the change:
Did you live in NL the whole year? (EXACT DATE)*	Yes No, namely In (country):	Yes No, namely In (country):
	Period in Holland:	Period in Holland:
Name Children	Date of birth	BSN

- It is important to know since the exact date of (de)registration with municipality upon entering of leaving

Documents (copy)

Income

- ❖ Year statement(s) employer(s) (also Pension / WW / WIA (UWV): AOW (SVB).
- ❖ Overview other income: freelance (also deductible expenses)
- ❖ Received (Partner-) Alimony (amount and personal information)
- ❖ Travel by public transport: OV / Travel – declaration / (send along)

One way Distance, if more than 10km km. Number of days a week .

We also need an overview of the received benefits of travel by employer



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Own house

- ❖ Overview WOZ value (of date 1-1-2019).
- ❖ Annual statement of paid mortgage.
- ❖ Erfpacht: overview of payments (annual canon)
- ❖ Overview temporarily rent (for example) for example AIRBNB
- ❖ Special things (gift, two places, family loan, divorce, monument)
(If this the case, we will contact you)

Moved to another house or Increased or other change of mortgage

- ❖ Statement of account from the notary (buy and sale)
- ❖ Exact date of relocation .. - .. - (according to GBA)
- ❖ Overview costs (improvement) of the own house.

Property, savings and investments

- ❖ Year statement(s) investment(s) also foreign accounts (1/1/2020)
- ❖ Year statement(s) bank account(s) also foreign accounts (1/1/2020)
- ❖ Statements dividend tax payments.
- ❖ Overview other property (other house, apartment or real estate), also in other country
- ❖ Statements other mortgages.
- ❖ Statements other debts (1-1-2020)

Personal tax deductions

- ❖ Payed alimony:
 - ex-partner (name + BSN + date of birth + address)
- ❖ Heath costs: not paid by the Insurance company, not own risk. (in case of high costs)
- ❖ Overview costs for study, if more than € 250,- (work related)
- ❖ Overview gifts / donations (ANBI)

Other tax deductions

- ❖ Statement Annuity ('lijfrente') Insurance or Bank (premium payments).
- ❖ Pension: pension growth 2019 (factor A) + income statement 2019.
- ❖ Statement 'incapacity for work insurance' (premium payments).

Tax return/allowance

- ❖ Statement tax return 2020 (monthly refund).
- ❖ Allowance Health, Rent or Child (= Zorgtoeslag, huurtoeslag of kindgebonden budget)



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Other Information (PLEASE CONTACT US FIRST)

- ❖ BOX 2 Name of the company + annual figures (BV, limited, etc.)
- ❖ Started an own company
- ❖ Received an inheritance
- ❖ Divorced or separated with partner in 2019 or 2020
- ❖ Emigration or immigration

The tax return is only been taken care of if:

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

Any specific question:

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: Signature Partner

Place

Date

Personal Data

In the context of taking care of the income tax return, we will process various personal details of you. We only process the data required for the execution of the assignment and will store the required data. You accept this by signing this form. If you believe that we do not process your personal data in accordance with the prevailing privacy legislation, we ask you to report this to us.