

Checklist tax assessment for income taxes 2016

Name :

Burgerservicenummer :

Date of birth :

Date of (de)registration in NL :

Nationality :

Other country of residence in 2016:.....

Date of birth of the youngest child:

Start date basic health insurance :

Premium health insurance :

Name partner :

Burgerservicenummer partner :

Date of birth partner :

Date of (de)registration in NL :

Nationality :

Other country of residence in 2016:

Start date basic health insurance :

Premium health insurance :

Street and house number :

Postal code and city :

Bank account number :

Telephone number :

E-mail :

If stated otherwise the requested documents are for 2016 and from you and your partner (if applicable).

Income box I

- o Copy salary overview(s) / social benefits overviews received from in and outside NL.
- o Travel benefit for public transport.
- o If you are a home owner the following documents are relevant:
 - o Overview yearly paid mortgage interest + outstanding debt at the end of the year. When you bought a house in 2016 you should include the notary overview of all other costs relating to getting the mortgage;
 - o Disposition WOZ-value with the reference date 01-01-2015; Stated on the municipality tax bill of 2016.
- o Received alimony from your ex-spouse or ex-partner.
- o Income from other working activity.
- o If you had an annuity the following documents are relevant:
 - o Overview paid premiums;
 - o Total income in the year 2015. This is the salary + social benefits + income from other working activities;
 - o Factor A of 2015. This is stated on the overview of your pension insurance;
 - o Contributions to your salary savings scheme.

Income box II

- o If you own more than 5% of the stock in a company than the following documents are relevant:
 - o Received dividend and other distribution of profits, from you, your partner and the minor children of you and your partner;
 - o Costs correlating with the acquisition of the stocks from you, your partner and the minor children of you and your partner;
 - o Profits which you received by selling your stocks (this is the selling price – acquisition price) stocks from you, your partner and the minor children of you and your partner.

Income Box III

- If you had more than €24.437 (for singles) or €48.874 (if you have a partner) in assets. Then the following documents are relevant:
 - Value assets on reference date 01-01-2016. This includes the balance on you bank/ savings account, your portfolio of shares, your second house and other real estate in the Netherlands and outside the Netherlands;
 - Value debt;

Taxable deductions from your income

- Paid alimony to your ex-spouse of ex-partner.
- Specific health care costs. These costs are medical and surgical costs, prescription drugs, certain aids, travel costs, prescription diet, extra home help and extra clothing and linens not covered by your health insurer and not the amount paid for your own risk in the policy.
- Study costs.
- Overview of charity contributions.

Adjustments of taxes

- Withheld dividend and/or gambling taxes.
- Paid preliminary tax assessments or received preliminary tax returns.

Taxable deductions of your payable taxes

- Overview of direct investments in venture capital and cultural or social investment.