

 040-3041753

 KVK: 87555646

 www.vdmeeren.nl

 Nieuwendijk 22, 5662 AE Geldrop

Administratiekantoor

van der Meeren

Checklist income-taxes 2023

Unless otherwise specified, all documents needed that are listed below you have to provide for both yourself as your Fiscal Partner (if applicable).

You have a Fiscal Partner when you can check one or more of the following demands:

Married, registered partnership, pension partners, shared ownership of your bought home, having children together or having underage child(ren) from one of the two of you living with you

General

1. Personal information **
2. If applicable name and date of birth of underage child(eren) within your household for at least 3 nights a week on average**
3. Your contact information (phone, e-mail etc)
4. When not living at the same address with your partner; date of moving in together, or when entering/leaving the Netherlands; migration date
5. Provisional Taxes (paid/received) over the taxation year

Wages, benefits, pensions

6. Yearly statements of all income; wages, benefits like UWV, unemployment, disability, etc. Pensions, transition payments (by layoffs), etc.
7. Received partner alimony
8. All other income where no taxes are withhold on, like Freelance, Newspaper-routes, self-employed, etc.

Paid amounts for future income (insurance)


9. Paid amount on the disability insurance or pensionfunds, including name of the company and number
10. So called "Factor A", received from the employer-based pension funds


Bought residence that is your primary living address

11. Yearly statement of the mortgage company ("The Bank") with paid interest and mortgage amount of 1-1 and 31-12
12. List of other loans taken out for improvement/maintenance/buying the primary residence, including paid interest, company and loan-number ***
13. WOZ amount for the taxation year (letter received in the start of the year or www.wozwaardeloket.nl)
14. When bought/sold a (new) primary residence and/or refinancing the mortgage:
 - Notary bill, both for sale/buy or refinancing
 - All other costs involving the selling/buying of the residence
 - Specification of the amounts of the mortgage spend on, others then the direct sum of the purchase (improvement/maintenance

Spending on former partner (alimony), Gifts to Charity and upkeep monuments

15. All expenses on the ex-partner**. For example alimony, mortgage, pensions
16. An overview of all gifts to (Dutch) charities
17. An overview of all expenses on your (national) monument(s) in your possession

 040-3041753

 KVK: 87555646

 www.vdmeeren.nl

 Nieuwendijk 22, 5662 AE Geldrop

Administratiekantoor van der Meeren

Medical expenses

18. An overview of all medical expenses paid, that are not (partially) covered by the insurance and/or own risk. Also no mandatory CAK expenses or insurance payments. For example:
- Medical attentions (not being eye-laser treatment, glasses or contacts)
 - Spending on transportation to/from medical treatment (KM and parking) for the household (partner and underage children)
 - Other travel expenses when: one of the household is in care for more than 1 month and one-way travel is more than 10 KM
 - Prescription medication
 - Diets prescribed by a doctor or dietitian, with proof of the prescription and kind of diet.
 - Costs for extra or special bedding when caused by disease, medication or others
 - Other medical expenses, issued by doctors, not being glasses/contact, walking aids ("Rollator")
 - Expenses for home-care that is not subjected to the WMO (city paid medical help)

Stocks, shares and private business

19. Owned shares of 5% or more in 1 particular company:
- Paid amount and statutory amount of the shares
 - Received interest and/or dividend including withhold dividend taxes
 - Name and address of the company (preferably the tax-number)
20. all other shares:
- Net worth of the shares on 1-1 and 31-12
 - Paid dividend and withhold dividend taxes
 - Amount of all "groene beleggingen", so called environment friendly shares

Savings and debts

21. Yearly statement of the banks with amounts on 1-1 and 31-12 of the partner and underage children in your care
22. Amount and exchange rate (31-12, 24.00h) of crypto currency (like bitcoins)
23. Borrowed or lend money; to/from who**, what amount and received/paid interest
24. If applicable 2nd home and other real-estate like garage-box, land, etc.
- WOZ amount or other likewise valuation of the property(s)
 - If rented out; received rent (excluding utilities) on a yearly base
25. Net worth of pension funds and other insurances on death/disabilities of 1-1 and 31-12, incl. start date
26. Overview of an undivided inheritance
27. An overview of all other loans, debts, possessions, etc.

Preferred way of receiving the information:

Per e-mail (PDF): via belasting@vdmeeren.nl

Of per physical mail: Nieuwendijk 22, 5662 AE, Geldrop

For questions or personal handing over of the documents you can come by or contact us on Monday through Thursday between 09.00 and 17.30h. By phone: 040-304 17 53 or per e-mail: belasting@vdmeeren.nl

() Digital pieces preferred in PDF format, as pictures (JPG) are larger in storage and hard to get a readable printout of.*

*(**) name, address, BSN en date of birth*

*(***) if provided by natural person: name, address, BSN and date of birth.*