

Questionnaire Income Tax Return 2018



Name		
Address		
Zip code/ City		
Date of Birth		
BSN -number		
E-mail		
<p>Did it mention the correct bank account number for the tax refund? If not; please give us your bank account number details. If you have a foreign bank account number please send us your BIC-Code & IBAN number. If you have a foreign bank account, please send us a copy of your ID and bank account statement not older than 2 months.</p>		Yes / No
<p>If you came or left the Netherlands in 2018, please give us the date you registered or deregistered yourself from the local city hall</p>		
<p>Personal Situation 2018 Single / Unmarried living together / Part of the year being unmarried living together / Married / Part of the year being married</p>		
<p>Name and date of birth of the child(ren) who are living at home</p>		
<p>Do you have the 30% ruling?</p>		Yes / No
Income	<p>Number of enclosed annual statements of yourself</p>	
	<p>Number of enclosed annual statements of your partner</p>	

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<p>Other income from yourself and/or your partner</p>	<p>for example supplementary earnings, freelancer, home help, received alimony</p>	
	<p>Did you made any costs concerning this income?</p>	
<p>Working abroad: Please give us the periods of working abroad and the country's; preferably an employer's declaration, copy pay slips, seaman's book, copy flight tickets (e-tickets/frequent flyer), passport with visa stamps</p> <p>Do you have a E101/A1-form? If so please sent us a copy of this.</p>		
<p>My travel expenses for public transportations have not been compensated by my employer: Please give us the distance / summon by week/ received compensation, send along your public transportations declaration</p>		<p>Yes / No</p>
<p>When you have real estate:</p> <ul style="list-style-type: none"> • Copy of your WOZ value / OZB assessment 2018 • The interest you paid for the mortgage in 2018 • The height of the mortgage debt on 31 December 2018 • Possible other costs you made with reference to your mortgage (for example taxation- and notary costs) please send us the bills of this <p>Did you raise your mortgage or do you have a new one? If so, we would like to know;</p> <ul style="list-style-type: none"> • The amount of the mortgage and the interest paid • The reason for raising your mortgage or have a new one 		
<p>Paid premiums for life annuity:</p> <ul style="list-style-type: none"> • The receipts from the premiums you have paid • The A-factor (pensioen aangroei) of 2017 when you save for your pension by your employer. You can find this on the annual statement 2018 of the pension. <p>Paid premiums for the Insurance incapacity for work disablement (AOV Insurance)</p>		

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This question is only if you NOT have the 30% ruling!!

If your assets minus your debts exceed € 30.000 (or together with your fiscal partner € 60.000) please send your annual statements 2018 of all your bank accounts, debts, shares etc.

Dutch dividend tax withheld on dividends, withholding tax deducted from interest on savings

A second home, we received like the WOZ value, overview of the mortgage and the rental per month

Tax deductions

Paid alimony for your ex-partner:

Total amount in 2018 you have paid on alimony

Name, date of birth, address ex-partner

Costs regarding your health:

- For example bills from the doctor, dentist, hospital, medicine etc.

This has to be costs that are not compensated by your health insurance company.

Yes / No

Study costs you have made for yourself and/or your partner? If so, please send us the bills. Only if more than euro 250

Yes / No

Did you and/or your partner receive any study grants from the DUO - IB-Groep in 2018? If so, please send us the annual statement you received from them.

Yes / No

Deductible gifts:

This has to be a gift to an organization that is mentioned as a Algemeen Nut Beogende Instelling (ANBI) (a religious, ideological, charitable or cultural organization)

If so, please send us an overview of the payments.

Yes / No

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Preliminary refund or paid a preliminary assessment & Toeslagen	
<p>Did you received a preliminary refund or paid a preliminary assessment for 2018?</p> <p>If so, please sent us a copy of this refund/assessment.</p>	
<p>Child care allowance:</p> <p>Please sent us the annual statement which you received from the child care.</p> <ul style="list-style-type: none">• How much contribution you received from your employer regarding the child care?• How much child care allowance you received in 2018? Please sent us a copy of the assessment you received for the child care allowance. <p>How much zorg- , huurtoeslag and/or kindgebonden budget do you received in 2018? Please sent us a copy of the assessments you received.</p>	

By signing this form I authorize Intax Tax Consultants to:

- file my income tax return 2018 electronically to the Tax Authorities
- use direct debit (automatische incasso) for the payment of the invoice for filling my income tax return 2018. My bank account number is . . .

Date

Signature