

Checklist For The Dutch Personal Income Tax Return

General information

Your current address: _____

- Copy of valid ID
- Tax authorities' notice to file a return (if issued)
- Copy of your 30% ruling (if applicable)
- Name and date of birth of your fiscal partner (if any)
- Initials and dates of birth of your children living with you
- Copy of the prior year's Dutch personal income tax return (unless, we helped you filing this)
- Migration date in case you entered or left the Netherlands during the year: _____(DD/MM/YY)
- Country where you lived prior to your move to the Netherlands: _____

Salary and other income

- year-end statement (*jaaropgaaf*) from employer(s) and/or benefit agency
- Overview of income and expenses (e.g. freelance work)
- Overview of alimony received (if any, please provide the contact details of your ex-partner)
- Overview of premiums paid for disability insurance or additional retirement plans
- In case you emigrated, the surrender value of your pension and life annuity rights as per emigration date (to be provided by the pension fund or insurance company)

If you bought or sold a house during the year

- Notary invoice/statement
- Overview of the mortgage loan (bank statement)
- Overview of the expenses relating to home improvement
- Statement *eigen woningreserve* (if applicable)

If you own a house

- The WOZ value statement from the Municipality
- Annual overview of the mortgage interest payments and the outstanding mortgage loan
- Overview other debt interest payments relating to your house
- Overview of the land lease payments (*erfpacht*)
- Provisional tax assessment (*voorlopige aanslag*), if applicable

Tax deductible expenses

- Overview of the healthcare expenses not covered by medical insurance, e.g. dentist, medications etc.
- Overview of educational expenses you paid yourself, e.g. tuition fees, books, etc.
- Overview of alimony paid (please provide the contact details of your ex-partner)
- Overview of donations to charities

If the value of your savings and investments exceeds € 30,000 on January 1

- Annual overview of bank accounts in the Netherlands and abroad
- Annual overview of (worldwide) stocks, bonds and other securities
- Overview of loans and debts
- Overview of policies capital insurance (*kapitaalverzekeringen*)
- (WOZ) value of property located in or outside the Netherlands, not being your main residence

Questions? Please feel free to call at +31 (0)6 14477931 or send an [e-mail message](#)