

CHECKLIST 2019 DUTCH PERSONAL INCOME TAX RETURN

GENERAL INFORMATION



- ✓ Copy of valid ID
- If applicable:**
- ✓ Copy of valid ID of your spouse / fiscal partner
- ✓ BSN, initials, dates of birth of your children living with you

FISCAL DATA

- ✓ Copy of the 2018 tax return, if applicable (unless prepared by TaxDirect)
- ✓ Preliminary tax assessment 2019
- ✓ Tax authorities' notice to file a return (if issued)

SPECIAL TAX SITUATIONS

If applicable:

- ✓ Copy of 30% ruling
- ✓ Copy of Certificate of Coverage (A1)
- ✓ Immigration date: if you entered or left the Netherlands in 2019: exact date of (de-) registration with municipality



SALARY & OTHER INCOME



- ✓ 2019 year-end statement ('jaaropgave') from employer(s) and benefits agencies (e.g. UWV etc.)
- ✓ Overview other income (including expenses), e.g. for freelancers.
- ✓ Overview alimony received (if any, please provide the contact details of your ex-spouse)
- ✓ Overview premiums paid for disability insurance or additional retirement plans ("lijfrente")
- ✓ Entrepreneurs: balance sheet & profit and loss account

IF YOU HAVE TOTAL SAVINGS / INVESTMENTS ABOVE €30,360 PLEASE PROVIDE VALUE PER 1-1-2019



- ✓ Annual overview of bank accounts
 - ✓ Annual overview of stocks, bonds and other securities
 - ✓ Overview of any other assets, eg. claims, cash (>€534), cryptocurrency, etc.)
 - ✓ Overview of loans and debts
 - ✓ Overview of policies 'kapitaalverzekeringen'
 - ✓ (WOZ-)value of foreign or Dutch property (not your main residence)
- Residents report worldwide assets, non-residents only Dutch source. 30% ruling holders only taxable on Dutch real estate*

IF YOU OWN A HOUSE (MAIN RESIDENCE)



- ✓ WOZ-value-statement from the municipality per January 1, 2018
- ✓ Annual overview (mortgage) interest payments relating to your house
- ✓ Overview of 2019 land lease payments ('erfpacht') (if applicable)
- ✓ Apartment owners: VVE share is taxable in Box 3

IF YOU BOUGHT OR SOLD A HOUSE IN 2019



- ✓ Notary invoice/statement
- ✓ Invoices from realtors / appraisers
- ✓ Overview mortgage bank
- ✓ Overview expenses relating to home improvement
- ✓ Value of 'eigen woningreserve' if house sold in the past.

TAX-DEDUCTIBLE EXPENSES



- ✓ Overview of non-insured healthcare expenses e.g. dentist, medication, 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 former spouse)
- ✓ Overview of donations to charities

Please note: if you have a spouse or fiscal partner, we will also need the information mentioned above for your spouse or fiscal partner

Questions? Call 020-8208340 or [e-mail!](mailto:info@taxdirect.nl)

<https://taxdirect.nl/frequently-asked-questions/>