

CHECKLIST

Tax return for 2023

Fill out this list and send your complete file to us.

Note: No original documents!

Name + partner's name	
Marital status	Single / cohabiting with/without cohabitation contract / Registered partner / married (please delete as appropriate)
Change of address?	Yes, new address:
	Moving date:
Telephone number	
E-mail address	

Name of children living at home and/or studying	Date of birth	Dependent on 31/12/2023
		YES / NO
		YES / NO
		YES / NO

	Copy of identification
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Working/benefits in the Netherlands

	Annual statement 2023 employer(s)
	Annual statement 2023 pension authority, e.g. SVB
	Annual statement 2023 benefits agency, e.g. UWV

Working/benefits Belgium

	Payslip 281.10 of the employer(s)
	Employer's Individual Account 2023
	Declaration of holiday allowance if you are a blue-collar worker. Please note: the holiday allowance received in 2023, about the performance of 2022
	Statement of end-of-year bonus, rest days, sick pay benefit, union benefit 2023
	Annual statement pension authority, such as the National Pensions Office 2023

You are saving in a voluntary pension in NL

	Statement of premium paid annuity premium
	Statement factor A 2022 (see the Uniform Pension Overview)
	Statement of disability insurance premiums paid

Continued Z.O.Z.

Home of residence

	WOZ value tax year 2023 (reference date 1-1-2022)
	Annual mortgage statement 2023

Have you purchased, sold or renovated your home of residence in 2023

	Notary settlement purchase/sale
	Invoice taxation report
	Invoice brokerage fees related to mortgage

Spousal support paid or received

	The amount received or paid by you
	Name, address and date of birth of the ex-partner

Medical expenses

	Invoices for non-reimbursed medical expenses; Everything that is covered by the insurance is not deductible
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Gifts

	The amount paid by you (only applicable to institutions that appear on the list of the Tax and Customs Administration Public Benefit Institution (ANBI))
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Assets in the Netherlands and/or abroad of you and your minor children. Reference date 01-01-2023 (and if available 31-12-2023)

	Balances of all checking and savings accounts
	Balance of endowment insurance policies taxed in box 3
	Balance of shares and investment products
	Value of other real estate in the Netherlands and/or abroad - If rented, rental income per month: € _____
	Balance of debts
	Value of other assets and receivables

Provisional assessment / Allowances 2023

	Statement of the provisional assessment 2023 (income tax and/or health insurance law)	
	Statement of the 2023 benefits decision (only to check your healthcare allowance and/or Child Budget)	You already receive healthcare allowance: YES / NO

If working in Belgium:**Working from home/ Salary Split**

	Summary of total days worked
	Overview of days worked from home
	Overview of days worked outside Belgium, e.g. business trips

Pension savings

	Voluntary pension savings and/or long-term savings
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Child support paid

	The amount paid by you
	Your child's name, address and date of birth

Company car

	Model, type and year of manufacture of the car
	Copy of the front and back of the registration certificate
	Net personal contribution to the employer
	Period of use (all or part of 2023)