

## DATA INCOME TAX RETURN 2008

To draw up your return, many data are needed. In order to check our data and to enable you to supply the complete data in an orderly way, we have drawn up the questionnaire below. We would like you to answer the **questions where applicable** and to send along the documents required (preferably copies of these documents) in a **separate folder** for your private administration.

### *Important information for private persons:*

Before we can submit your return electronically, you will need a DigiD log-in code. DigiD stands for digital identity and is a strictly personal combination of a user name and a password. You can apply for your personal DigiD log-in code online through [www.digid.nl/aanvragen](http://www.digid.nl/aanvragen).

**Without this DigiD log-in code we are unable to submit your return to the Tax Authorities!**

### DigiD log-in code:

User name: .....

Password: .....

### 1. For married couples

Were you married the whole year? yes/no

Did you get married in 2008? yes/no : If so, on (date) .....

Did you get divorced in 2008? yes/no : If so, on (date).....

### 2. For unmarried couples living together

Did you live together the whole year? yes/no:.....

Were you both recorded at the same address in the population register for the whole year? yes/no : If not, over which period were you recorded? (dates):.....

Did you start living together in 2008? yes/no : If so, on what date.....

Did you separate in 2008? yes/no : If so, on what date.....

### 3. Children

If you have children living at home:

Child 1 Name:.....date of birth.....

Child 2 Name:.....date of birth.....

**4. Income from employers, pensions and the like**

Did you and your partner

- have income from employment;
- receive a benefit (from UWV (Body implementing employee insurance schemes), USZO (Benefits agency for the public service and education sector), Sociale Verzekeringsbank (Social insurance bank), and the like);
- receive a pension or an annuity payment subject to wage tax in 2008?

Please, add a copy of the annual income statement 2008 of employer(s) or benefits agency(ies).

**5. Alimony**

Did you receive alimony? If so:

Amount (not the amount received for children) €.....

From:

Name of payer: .....

Address: .....

Postal code and city: .....

**6. Privately-owned home**

If you are the owner and also the occupant of your privately-owned (principal) home:

Value according to the assessment under the WOZ (Valuation of Immovable Property Act) of the municipality\* €.....

Mortgage interest paid (not the repayment or premiums) €.....(please enclose copy of annual review 2008)...

Remaining debt at the end of the year €.....(please enclose copy of annual review 2008)...

**7. If you have sold / bought a house in 2008**

The completion statement of the sale / purchase of the house.

Valuation costs for taking out the loan € .....

Since when have you lived in the new home? date:.....

Do you have a savings-based or endowment mortgage? If so, please enclose copy of the policy (not the quotation !)

If you have bought a house, do not forget to include the annual reviews 2008, stating the mortgage interest paid and the balance as at 31-12-2008 of both the old and the new mortgage.

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If you have bought a house, do not forget to include the WOZ assessments of your previous home and your new home.

### 8. Second home

Do you have a holiday home or a second home? If so:

Supply a statement of the open market value (not the WOZ value) of the home.

If the home is put at the disposal of a rental company or estate agency for more than 70% of the time, please supply the WOZ value.

Rented property (for more properties, please provide separate specifications):

	As at 1 January	As at 31 December
-Value in unoccupied state	€.....	€.....
-Debt with respect to the property	€.....	€.....

### 9. Do you own a listed building ? If so, please supply a survey of:

The costs: maintenance costs, and for the privately-owned home the property charges, such as the owner's property charges, insurances, municipal taxes.

Income: subsidies received and due (supply decision).

### 10. Other assets and liabilities

Bank accounts, savings balance or receivables:

- The balance of all private bank and giro accounts as at 1 January and as at 31 December 2008.

Stocks and other investments

- A survey of the value as at 1 January and as at 31 December 2008 (for example, the statement of securities of your bank).

- The amount of the retained dividend tax.

Debts (not for your privately-owned home), personal loans, credits, and so forth:

- The remaining debts as at 1 January and as at 31 December 2008.

#### **Attention:**

If the total assets and liabilities are on balance lower than € 20 315.- you do not have to declare them to the Tax Authorities. If you are married or live together (> 6 months), the tax-free threshold (box 3) is doubled to € 40 630.-. The tax-free threshold is also raised by € 2 715.- for each child under the age of 18 and living at home.

**Should your capital exceed the tax-free threshold, you are obliged to fill in the above-mentioned balances on the tax-return form.**

## **11. Special tax-deductible items**

### **Medical expenses**

If you had considerable medical expenses in 2008, which were not covered by your insurance, you are probably entitled to deduction of these expenses.

Examples:

Medical insurance premiums, non-refundable dentist's expenses, doctor's expenses, hospital expenses, glasses, contact lenses and other medical aids.

### **Training expenses**

Did you have any expenses for training either for yourself or for your partner? This could be a training for a new profession or for a training to help you perform better in your current profession.

- A specification of the expenses

### **Annuity premiums**

- The premiums paid in 2008
- Accretion of pension over 2006 and 2007
- Copy of policy with clauses sheets

### **Donations**

-Did you make any donations to charities? Please, send a specification.

This questionnaire only covers the most common situations. If you are not sure as to whether certain expenses are deductible, you can always contact us – rather one question too many than an incorrect tax return !

<p>We shall take great care to provide a correct and most favourable completion of your tax return. However, we cannot be held responsible for information that is supplied incorrectly or not at all.</p>
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