

## Checklist Income Tax Individuals

### General

- Income Tax form
- Personal information yourself
- Personal information from your partner
- Information kids

### BOX 1

- All annual income statements
- Reconciliation travel expenses home/work public travel
- Reconciliation company car/ mileage report
- Invoices buy or sell home in relevant tax-year, invoices notary etc
- Reconciliation mortgage payments
- Information statement 'WOZ' value
- Reconciliation costs children care
- Reconciliation payments 'annuity' ( Lijfrente)
- Reconciliation received annuity (Lijfrente)
- Other income (e.g. alimony)

### Personal deductibles

- Reconciliation alimony payments
- Reconciliation health insurance costs
- Reconciliation study costs
- Reconciliation deductible gifts
- Reconciliation other personal deductible costs

### BOX 2

- Reconciliation participations in other companies (participation of 5% or more)

### BOX 3

- Reconciliation bank statements as per 1 st January AND as per 31 st December (including children's <
- Reconciliation 'spaarloon- en premiespaarregelingen'
- Reconciliation value shares, bonds etc as per 1st January and as per 31 December
- Reconciliation lease structure of stock
- Reconciliation 'dufkapitaal/culturele' investments
- Reconciliation 'green-investments/social-ethical' investments
- Reconciliation receipt dividends
- Reconciliation second home building and or investments in other buildings
- Annual statements of Capital- or Life insurances
- Reconciliation of other assets and liabilities

### Other

- Preliminary tax assessments for relevant tax year
- Preliminary tax returns
- Tax filing prior year
- All other relevant information

