



DUTCH TAX RETURN

1. General Information:

- 1.1. Copy of your and your partner's passport;
- 1.2. Your personal tax ID-number (BSN) and nationality;
- 1.3. personal information of your fiscal partner* (full name, date of birth, tax ID-number (BSN), nationality etc.); *(Please apply rest of the questions throughout all the Parts also to your partner, if applicable)*
- 1.4. details of your child(ren); full name, date of birth, tax ID-number (BSN), nationality;
- 1.5. a copy of your 2015 Dutch tax return (if not prepared by onestopTaxPrep or not already provided);
- 1.6. the exact date that you arrived in The Netherlands;
- 1.7. the date that you registered with the municipality in the Netherlands;
- 1.8. your current address in the Netherlands;
- 1.9. the exact date that you left The Netherlands (if applicable);
- 1.10. the date that you de-registered with the municipality in the Netherlands (if applicable);
- 1.11. if you de-registered, the address you provided to the municipality as your new address;
- 1.12. information on any deductions that you may have (education expenses, medical expenses excluding insurance premiums and 'eigen risico', charitable contributions, alimony payments, child support etc);

2. Employment Income: *(tick the box if not applicable)*

- 2.1. 2016 year end salary statement;
- 2.2. last/ December Dutch salary slip(s) for 2016;
- 2.3. salary slips indicating bonus, vacation pay and / or stock options exercise;
- 2.4. did you receive any payments from (past) employment outside the Netherlands, for instance residual bonus or stock options;
- 2.5. did you take any leave during the year (sabbatical, parental leave or so-called "levensloopverlof");
- 2.5. did you receive any other income, such as payments from pension plans;

3. Business Income (incl. freelance, self-employment):

(tick the box if not applicable)

- 3.1. the balance sheet and profit and loss statement of the business (or if not available, the financial statements up to date);
- 3.2. Beginning and ending balance of your business bank account;
- 3.3. if you were self-employed (eenmanszaak) or had freelance income: an overview of income and expenses;

* Fiscal partnership applies to taxpayers in the following situations:

- you are married, or;
- you are registered partners, or;
- you have a cohabitation agreement (notarized agreement), or;
- you have a child together, or;
- you are mentioned as beneficiary to each other's pension scheme, or;
- you own a permanent home together;
- either you or the other adult have a child registered at the same address and you didn't request to exclude partnership with a written statement;
- you were considered fiscal partners in last year's tax return.



4. Home Ownership: *(tick the box if not applicable)*

- 4.1. a copy of the preliminary refund (Voorlopige Aanslag) you received for the mortgage interest/personal deductions 2016;
- 4.2. the 2016 mortgage interest payments;
- 4.3. a copy of the real estate tax bill that you received in 2016 (indicating the so-called WOZ value of your home);
- 4.4. if the home was purchased during the tax year, a copy of the notary's or sold invoice indicating the purchase date, purchase price and all costs related to the purchase (the so-called 'Nota van Afrekening');
- 4.5. if you received a mortgage loan from your own company or an individual, please provide a copy of the loan agreement

5. The 30% Ruling:

- 5.1. if were you granted the 30% ruling, please indicate the grant and expiration date
- 5.2. your travel calendar (see attached);

6. Assets

- 6.1. if you do NOT have the 30% ruling for the entire year, then you will also be subject to Dutch taxation on your worldwide assets if the total value exceeds EUR 21.330 (fiscal partners EUR 42,660) on January 1, 2016 even if you still lived abroad at that time. In this respect, please provide a summary of your assets on January 1, 2016:
 - 6.1.1. your Dutch bank and investment accounts;
 - 6.1.2. your non-Dutch bank and investment accounts;
 - 6.1.3. your offshore bank and investment accounts;
 - 6.1.4. of any savings plans or offshore retirement accounts (Dutch or non-Dutch);
 - 6.1.5. of any structured investment plans that you may have;
 - 6.1.6. of any real estate property you may own (please provide address, year beginning and ending balances of related loans and property value);
 - 6.1.7. of any debts you had (credit card, personal loans, student loans etc);
 - 6.1.8. details of any (ordinary) dividend earnings.