

TAX QUESTIONNAIRE TAX YEAR 2021

In order to complete and file your tax return for tax year 2021, you need to complete this questionnaire and return it, with enclosures, to one of the following addresses:

maurice@witlox.info or by post to:
Witlox International Tax Advice
Hescheweg 79
5342 CG Oss

In case you have any questions please do not hesitate to contact me in order to solve these questions. This will speed up the filing process, so the sooner you will get information about your tax position for tax year 2021.

Contactdetails:

Tel: 0412-644898

Mob: 06-29135799

Email: maurice@witlox.info

Whenever documents are asked for in the Questionnaire please send me copies and no originals!!! Electronic copies are preferred from our side.

In order to check if the Revenue Service has agreed with the return filed please send me a copy of the tax assessment received so I will be able to check(this is included in my services)

Please note that my office is closed between August 1, 2022, and August 22, 2022 during the summer holiday.

BRINGING IN A NEW CUSTOMER WILL GIVE A ONE TIME DISCOUNT OF € 50 ON YOUR INVOICE PER CUSTOMER.

Please answer all relevant questions. In case a question is not applicable to you fill out NA.

- Name:

- Nationality:

- Day of birth:

- Address on 01-01-21:

- Address on 31-12-21:

- Current address:

- Phone:

Email:

- Married (yes/no)

or living together (yes/no)

When married/living together: partners' name:

BSNnumber:

Date of birth:

Joined household/married since

Living on the same address: yes/no

- If not please give address spouse or partner:

The following questions are about your income and any deductible elements thereon. Please enclose copies of statements when requested:

- Enclose copies of income statements from your employer(s) concerning tax year 2021. Also enclose income statements from your spouse his/her income statements, if applicable;
- Distance from home to work in case **travelling by public transportation** km

- Do you own a house in The Netherlands? Yes/no If yes please provide me with the following:
 - WOZ value of the house (please enclose a copy of the real estate tax bill received from city hall beginning of 2021, with the value of 1-1-20);
 - Amount of interest paid on the mortgage (please enclose a copy of the overview received from the bank);
 - In case the house was bought in 2021, I need the following:
 - Copy of the notary bill;
 - Copy of the invoice for valuation;
 - Any other relevant documents except mortgage deed;

- Medical expenses are deductible in case they exceed 1.65% of the combined income of you and your partner. For income over € 41,107 the threshold is 5,75% of the combined income. If so please enclose the following:
 - Copies of bills;
 - Copies of amounts reimbursed by the insurance company;
 (I will be able to check which item is deductible and which one isn't)

- Expenses paid for an education; In case you incurred these expenses, enclose the following copies of documents:
 - Bills for materials bought and tuition;
 - Overview of reimbursements from employer;

- Gifts made to charity are deductible in case they exceed 1% of your taxable income with a maximum of 10% of the same taxable income. In case you make a gift based on an annuity there are no limits. If you meet the threshold, please enclose copies of gifts made;

- Premium paid into a Dutch life annuity(pension plan). If made please enclose prove of the payments made. These payments are deductible within certain limits.

- Alimony payments made to a former spouse are tax deductible. Amounts paid to support children still living with the former spouse aren't. Enclose copies of the payments made, plus name and address of former spouse;

- A second home in The Netherlands is taxable. To calculate the tax thereon I need to have the so-called WOZ value of the house and the year-end balance of the mortgage thereon;

- Interest paid for a mortgage on a former home is tax deductible for the first two years the house is for sale. If so please enclose copies of the interest paid and the address of the house. This is also the case with regard to a foreign former home. In case a house is bought in a foreign country that is going to be the new residence within two years, the interest paid on a mortgage is also tax deductible;

- For US citizens and people living abroad (partner still living in former country), please enclose a list with days spent outside the Netherlands and each free day spent in the Netherlands like New year, Easter etc or regular holiday spent in Holland. For each day tell me whether it is a business day or a holiday. **Please provide the info on a signed statement from your employer. Upon request I can send a travel calendar. With the pandemic we can use a special regulation for non residents. They can give me a seperate overview of days they would have worked from home anyway.**

The following info needs to be send to me if applicable and not already in my possession:

- Copy of preliminary tax assessments for tax year 2021 and 2022(like the monthly refund on the mortgage, or monthly refund for the non working spouse/partner;
- Initials and day of birth of your children, if under the age of 18;
- Any information not requested before but what you think has an impact on your tax liability.

The next part is only for people who were not in the 30% ruling for (part of) tax year 2021, **while living in The Netherlands.**

Enclose an overview of the following items:

Bank accounts and shares:

- balances on January 1, 2021, plus
- balances on 31 December 2021(not needed for filing, but then a proper tax advice can be given).

For other assets like second homes, life annuities, capital savings schemes, employee savings schemes, debts and loans you need to provide me with the value in EUR on the applicable day.