

Overview of documents which are important for filling in the income tax form 2018.

Personal information.

- Name, address, birthday, social security number, civil status, information partner, information children.
- DigiD information, user name and password.
- Permission code 2018, Dutch tax office.

Tax form.

- Invitation of the Dutch tax office for filling in the tax form 2018.
- A copy of the tax form 2017.

Income.

- Annual statement income 2018.
- Annual statement dole/incapacity benefit 2018.
- Annual statement retirement pension 2018.
- Information about another income 2018 of which tax responsibility is not been payed yet.

Travel costs to work.

- If traveling to work in 2018 was by public transportation than information about how many kilometers one way and a public transportation certification 2018.

Own property.

- Annual statement mortgage interest 2018.
- Disposition real estate taxes 2018.
- Valuation note (already in our file)
- Notary statement (already in our file)

Bank accounts.

- If your bank balance on 1 January 2018 of all your bank accounts together is more than E 30.000,00 per person (E 60.000,00 for couples) than an overview off all these bank accounts is necessary.
- If you have investment accounts than an overview off payed dividend tax in 2018 is necessary.
- If you have debts above E 3.000,00 per person (E 6.000,00 for couples) than an overview off all debts 2018 is necessary.

Annuity insurance.

- If you have annuity insurance than an overview of payed premium in 2018 is necessary.
- If you have annuity insurances than the most resent (2018) pension overview of your employer.
- If you have an incapacity insurance than an overview of payed premium in 2018 is necessary.

Medical expenses.

- If you have medical expenses payed by yourselves (not your own risk) for which you did not have received indemnity of your medical insurance, make an overview of the costs, proof of payment and accounts of doctors, dentists, hospitals and more.

Donations.

- If there are demonstrable donations to charities (not the gifts in collection buses) make an overview of the amounts and proof of payment.

Study costs.

- If you have costs for a study for work improvement and you payed yourselves more than E 250,00, make an overview of the costs, proof of payment and accounts of courses, books, school and more. The costs for study payed by your employer are not necessary.

Alimony.

- If you have received partner alimony in 2018 (not the alimony for children), make an overview and receipts. Also the personal information of the payer.
- If you have payed partner alimony in 2018 (not the alimony for children), make an overview and proof of payment. Also the personal information of the recipient.

Provisional assessment.

- If you payed a provisional income tax assessment 2018, we need the proof of payment and the tax assessment.
- If you received a provisional income tax assessment 2018, we need the receipt and the tax assessment.

Adjudication.

- If you received tax adjudications of any kind in 2018, we need the receipts and the assessments.