

# Checklist income tax return 2025

In order to prepare your (and your partners') income tax return we have prepared this checklist. In this checklist we ask you for documents that we (possibly) need for your tax return and / or deductible items that we can include in your tax return.

## 1. Tax Office:

- The declaration note from you (and your possible partner)
- Approval Registration Proxy Intermediary "Registratie machtiging intermediair goedkeuren"
- Provisional tax assessment/refund income tax 2025
- Provisional tax assessment/refund of "Toeslagen" 2025

## 2. Income, social welfare and pension regarding yourself (and your partner)

- Copy of your annual statement(s) of 2025 received from your employer, pension or welfare
- Public transportation declaration or Travel declaration of your Employer
- Income from other activities

## 3. Your owner-occupied residence:

- Interest on your mortgage paid in 2025 and the balance at 31-12-2025
- Specification of the mortgage with (if applicable) the part not used to finance your owner-occupied residence
- WOZ value of the own home level date 01-01-2024 (see municipal taxes for 2025)

## 4. Additional information when purchasing a first owner-occupied residence:

- Specification of the notary's bill
- copy of the mortgage agreement
- Statement of the construction/conversion depot

## 5. Additional information when the mortgage is changed during 2025:

- Specification of the costs/penalty interest, settlement of the notary
- copy of the mortgage agreement
- Mortgage advise from the mortgage supplier or mortgage broker

**PLEASE PAY ATTENTION TO THE FOLLOWING!**

## 6. When selling and/or purchasing your owner-occupied residence, we need extra data on the axe scheme ("Bijleenregeling").

- Selling price of the old owner-occupied residence
- Balance of the old mortgage at the time of the sale
- Overvalue of the old owner-occupied home (can also be negative)
- Purchase price purchased owner-occupied home including purchase costs
- Interest and balance mortgages 2025 of both homes
- Mortgage advise from the mortgage supplier or mortgage broker

## 7. Accounts, saving accounts, investments and not owner occupied other residences/real estate

- Balance of all bank accounts (including your underage children) as per 01-01-2025
- Balance of all investments (including your underage children) as of 01-01-2025. Please note that also all crypto currency must be declared
- Address and value (WOZ) of other properties than your residential property
- Overview of your share in "Vereniging van Eigenaren"

## 8. Deductions:

- Health expenses not reimbursed by health insurance
- Travel expenses for visiting doctor, specialist, dentist etc.
- Paid alimony to ex-partner including de ex-partners name, BSN and date of birth
- Overview of donations and ecclesiastical contribution
- Overview of the Pension scheme, the yearly UPO statement
- Premiums paid for personal pension and income protection plans
- Premiums paid for income protection during illness (AOV)

## 9. Substantial Interest

Do you (or your partner) owe more than 5% of the shares in a company please state the following:

- The name and fiscal number of the company
- How many shares, % of the shares and value
- The purchase value and related cost of the shares
- Do you have a receivable on that company? If yes, the amount and the received interest in 2025
- Do you have a payable to that company? If yes, the amount and the paid interest in 2025
- Did you receive dividends? Yes, what is the amount and the withheld dividend tax
- Did you dispose shares? If yes, please provide the date and disposing value of those shares

## 10. Other documents

- Name of your children, date of birth and BSN (Social Security number) and if they live at the same address as you for more than 6 months in 2025
- If you or your partner have the 30% ruling, please provide the confirmation letter from the tax office
- Other documents that can be of interest for the tax preparation of the tax return

**The checklist above is an extended version. It is possible that it contains information that does not apply to you (or your partner). In such a case, you can omit this requested documentation.**

**If in your opinion relevant documents are missing, you can of course also send them along.**