

## Checklist for Tax return

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- Annual statement (s) of income and benefits
- Travel costs for commuting by public transport (numbers of days. Distance in km one way, with public transport statement)
- Statement of balance of checking account and saving account (all) per 01-01 and per 31-12
- Statement balance of investment account (all) per 01-01 and per 31-12
- Statement of value of shareholdings per 01-01 and per 31-12
- Statement of value of crypto points per 01-01 and per 31-12
- Statement of any foreign bank accounts per 01-01 and per 31-12
- Statement paid mortgage interest and balance per 31-12
- WOZ-order (assessment for municipal levies) reference date 2022
- Any notary account upon entering into, transfer or increasing mortgage (indicate which part has not been used to improve the home and Home Ownership Reserve)
- Any notary settlement of the sale of the owner-occupied home
- Statement of debts, not being a mortgage
- Statement of the balance of a blocked savings account, salary savings schemes
- Statement from insurers, regarding the value of policies (with the exception of those falling in Box 1)
- Paid annuity premiums
- Paid premiums for personal obligations (e.g. mortgage disability etc.)
- Extraordinary expenses, such as medical expenses, study costs, gifts (threshold application). Please specify medical expenses in:
  - Diets including the doctor's statement
  - Medical Tools/Instruments
  - Number of kilometers to and from doctors, hospital, and dentist
  - Contribution
  - Rollators
  - Fracture treatment
  - Orthopedic footwear
- Any annual statement for childcare
- Personal deduction such as alimony, maintenance of children
- Provisional refund or assessment for tax year and/or healthcare allowance, rent allowance, child-related allowance and childcare allowance