

Checklist for Tax return

- ☐ 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 2025
- ☐ 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
 - Personal 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