## QUESTIONNAIRE B 2024

# GENERAL

**Personal data (please complete this item)**

|  |  |
| --- | --- |
| Marital status (married / registered partnership / single / living together / divorced).  If your status is “living together,” you can choose to be treated as “fiscal partners” under certain conditions. It is therefore advisable for both returns to be filed together (if applicable). If your partner’s return is prepared by another firm, please enclose a copy of their return or have your partner complete a questionnaire, too. |  |
| If your marital status changed in 2024, please state date and nature of change. |  |
| Spouse/partner name and date of birth. |  |
| Did spouse/partner generate income in 2024? |  |
| Children('s) name(s) and date(s) of birth (up to 18 years old). |  |
| Current e-mail address. |  |
| Residence/home addresses in 2024 and dates each address was applicable (only important if you changed addresses during 2024). |  |

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# BOX 1 employment income / labour income/ own house (residence) / personal allowances / extra ordinary expenses

**Employment income/pension**

|  |  |
| --- | --- |
| Enclose a copy of the December 2024 salary/pension specification from your employer and your year-end statement of income (if applicable). |  |

**“Levensloop”**

|  |  |
| --- | --- |
| If you participated in the so-called “levensloopregeling”, please state details. |  |

**Other income**

|  |  |
| --- | --- |
| State source and amount of “other” labour income or other periodical income (if applicable). |  |

**Own home (your residence)**

|  |  |
| --- | --- |
| Value of your own home **(primary residence)** as stated on the “Beschikking Waardering Onroerende Zaken” applicable for the year 2024 (value date 01/01/2023). Please enclose a copy. |  |
| Attach a breakdown of mortgage interest and related costs paid in 2024 (if you purchased your home in 2024 or increased the mortgage, enclose a copy of the notary’s invoice, invoice re taxation).  If you increased your mortgage in 2024, please state the purpose of the increase. |  |
| Outstanding mortgage balance at 31/12/2024. |  |

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**Allowances**

|  |  |
| --- | --- |
| Premiums paid/refunded for annuity (please enclose policy and details). A pension deficit must always be proved. Please enclose a letter of the pension company showing the fiscal growth of your pension in 2023/2024. |  |
| Premiums paid/refunded for a disability insurance. |  |

**Extraordinary expenses**

|  |  |
| --- | --- |
| Alimony paid to former spouse. State former spouse’s name, address and date of birth. |  |
| Sickness expenses  Only a number of specific non-reimbursed expenses incurred due to illness (expenses deducted from own risk are not included). Premiums paid for health insurance is no longer deductible.  Please note that no deduction is possible for sickness expenses below € 163/€ 326 up to 1,65%/5,75% of total income (no maximum applies). |  |
| Expenses for study are **no** longer deductible from 2021. |  |
| Expenses for livelihood of children up to 21 years old are **no** longer tax deductible from the year 2015. |  |
| Charitable donations (thresholds may apply). |  |

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# BOX 3 deemed income from net wealth (from 2011 only the value as per 1 January is relevant, but if you already have the balances/value as per 31 December please fill it out)

# Bank accounts in and outside the Netherlands

|  |  |  |
| --- | --- | --- |
| Personal Bank Account Balance(s) for accounts in your name, your spouse’s name and/or children’s name(s). *(state name of bank and account number)*  -  -  -  - | *Balance as per 01/01/24* | *Balance as per 31/12/24* |

**Other claims (“vorderingen”)**

|  |  |  |
| --- | --- | --- |
| Balances of personal claims in your name, your spouse’s name and/or children’s name(s). *(state name of person)*  - | *Balance as per 01/01/24* | *Balance as per 31/12/24* |

**Shares in and outside the Netherlands**

|  |  |  |
| --- | --- | --- |
| Value of personal investments (funds, shares, bonds, etc.) in your name, your spouse’s name and/or children’s name(s).  -  -  -  Also specify any dividend tax withheld on dividends received in 2024. | *Value as per 01/01/24* | *Value as per 31/12/24* |

**Employees’ savings / investments accounts (“spaarloon/spaarpremie”)**

|  |  |  |
| --- | --- | --- |
| Balances of employee savings / investments account(s) in your name, your spouse’s name and/or children’s name(s). *(state name of bank and account number)*  -  - | *Balance as per 01/01/24* | *Balance as per 31/12/24* |

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**Debts in and outside the Netherlands**

|  |  |  |
| --- | --- | --- |
| Balance(s) of personal debt(s) not related to own home your spouse’s name and/or children’s name(s). *(state name of bank and account number)*  -  - | *Balance as per 01/01/24* | *Balance as per 31/12/24* |

**Capital insurance**

|  |  |
| --- | --- |
| Details of any existing capital insurance (potentially taken out in conjunction with a mortgage on your home). |  |

**Real estate/personal property in and outside the Netherlands**

|  |  |  |
| --- | --- | --- |
| Market value and address of (rented) real estate (other than your primary residence). If real estate located in the Netherlands, please enclose “Beschikking Waardering Onroerende Zaken” valid for the year 2024. Please state  rental income.  If you purchased/sold real estate outside the Netherlands, please state date of purchase/sale and purchase/sale price. | Value as per 01/01/24 | Value as per 31/12/24 |
| Balance of the outstanding loan(s) pertinent to above-mentioned real estate.  - | Balance as per 01/01/24 | Balance as per 31/12/24 |

**Capital insurance**

|  |  |
| --- | --- |
| Details of any existing capital insurance (potentially taken out in conjunction with a mortgage on your home). |  |

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**Real estate/personal property in the Netherlands**

|  |  |  |
| --- | --- | --- |
| WOZ value and address of (rented) real estate. Please enclose “Beschikking Waardering Onroerende Zaken” valid for the year 2024. Please state rental income.  If you purchased/sold real estate during 2024, please state date of purchase/sale and purchase/sale price. | Value as per 01/01/24 | Value as per 31/12/24 |
| Balance of the outstanding loan(s) pertinent to above-mentioned real estate. | Balance as per 01/01/24 | Balance as per 31/12/24 |

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