

Income tax questionnaire 2011

For the preparation of the Dutch income tax return we need information about your personal situation. We kindly request you to complete this questionnaire. After completion please sign and date the questionnaire and return it with the relevant documentation.

Personal information

- q Initials and surname : _____
- q Address : _____
- q Postcode and City : _____
- q Telephone (home) : _____
- q Telephone (work/mobile) : _____
- q Email : _____
- q Dutch social security number (Sofinummer/BSN) : _____
- q Date of Birth : _____ M / V
- q Dutch Bank account number : _____
- q Do you have the 30% ruling : YES/NO if so, please provide a copy
- q Did you live in the Netherlands the whole year : YES/NO
- q If not, which date did you enter/leave the Netherlands : _____
- q In which country did/do you reside before entering/after leaving the Netherlands in 2011 : _____
- q Did you register at the town hall : YES/NO If so, please specify and provide a copy of registration

Spouse/partner

- q Initials and surname : _____
- q Address : _____
- q Postcode and City : _____
- q Dutch social security number (Sofinummer/BSN) : _____

q	Date of Birth	:	M / V
q	Dutch Bank account number	:	
q	Do you have the 30% ruling	YES/NO	if so, please provide a copy
q	Did you live in the Netherlands the whole year	YES/NO	
q	If not, which date did you enter/leave the Netherlands		
q	In which country did/do you reside before entering/after leaving the Netherlands in 2011		
q	Did you register at the town hall	YES/NO	if so, please specify and provide a copy of registration

Please note.

If your spouse/partner also has income or tax deductions, he/she must fill in their own tax questionnaire

Tax Return

q	Did you receive a request to file a tax return form the Dutch tax authorities?	YES/NO	if so, please provide a copy
q	Did your partner receive a request to file a tax return form the Dutch tax authorities	YES/NO	if so, please provide a copy
q	Did you or your spouse file a 2010 Dutch income tax return	YES/NO	if so, please provide a copy
q	Did you or your partner remained socially secured in your country of origin	YES/NO	if so, please provide us with copies of the E-101 or certificate of coverage

For married couples:

q	Have you been married the entire year of 2011?	YES/NO	
q	Did you marry in 2011?	YES/NO	: If so, date of marriage : _____
q	Have you been permanently separated in 2011?	YES/NO	: If so, date of separation : _____
q	Have you divorced in 2011?	YES/NO	: If so, date of divorce : _____

For unmarried couples:

- q Have you lived together the entire 2011 year? YES/NO
- q Have you both been registered at the same address for the entire 2011 year? YES/NO : If not, for which period were you? : _____
- q Did you begin living together in 2011? If so, send a copy of your living agreement YES/NO If so, please specify date _____
- q Did you separate in 2011? YES/NO : If so, date of separation : _____

Children

Do you have children and did they join you in the Netherlands? If so, please fill in below the initials, date(s) of birth and sofinummers of your children

Initials	Date of Birth	Sofinummer (BSN)

- Did you or your spouse receive in 2011 _____
- q Child support (kinderbijslag) YES/NO : If so from which country? : _____
 - q Child care allowance (kinderopvangtoslag) YES/NO If so, please provided a copy _____
 - q Child supplement (kind gebonden budget) YES/NO If so, please provided a copy _____

Assessments

If applicable, please attach

- q The request to file a Dutch income tax return;
- q A copy of the E-101/certificate of coverage;
- q Any preliminary and/or final assessments received;
- q If this is the first year we are preparing your income tax return: a copy of your 2010 tax return.

Income

Income from employment, pensions, etc.

Did you receive in 2011:

- Employment Income;
- A payment from UWV, Sociale Verzekeringsbank and such;
- A pension payment or an annuity payment.

Please attach copies of the 2011 annual statements from employers and/or benefit agencies

30%-ruling

Did you in change from employer in 2011 YES/NO

If so, did you file with the new employer a request to continue the 30%-ruling YES/NO
If so, please provided us with a copy of the new 30%-rule

Please note that if the 30%-ruling is not continued, the 30%/-ruling is no more applicable and this might change your tax status!

Company Car

If you drive a company car, the taxable benefit is already taxed and withheld from your salary

Declaration no private use

If private use of the company car is less than 500 km, the taxable benefit is taken as € nil. Your employer can only calculate the taxable benefit of € nil if they receive the declaration "geen prive gebruik auto" You must request this declaration from the tax authorities.

The chance is very likely (almost 100%) that the tax authorities will ask you to prove that you indeed have driven so few kilometres (less than 500 km in 2011). You can prove this with a detailed travel log. It must show which business trips and private trips you have made on which date. Also the destinations and the total kilometres driven must be stated. We advise you to have the detailed km administration ready and keep it with your administration.(if you don't have a km registration please email us for an example).

Commute with public transport

Did you regularly travel to work with public transport in 2011? If so then specify:

- The distance stated on your public transport declaration :
- or*
- The distance stated on the travel declaration from your employer :
- The number of days per week you travelled to work with public transport :
- If you only commuted with public transport for part of the year. Please specify the period :
- The travel cost reimbursements for public transport you received from your employer (total year amount) : €

Other Income

Have you in addition to your employment income received any income from other sources?

If so, please specify

- The amount received
- The associated costs paid

Life-course savings scheme

- q Have you withdrawn money from your Life-course savings scheme for paid leave? YES/NO If so, please specify €

Parental leave

- q Did you take parental leave in 2011? YES/NO : If so, please send the parental leave declaration you received from your employer

Alimony

Did you receive alimony? YES/NO

If so:

- q Total amount received for year (please note. not the amount received for the child(ren)) : € _____

Paid by:

- q Name : _____
- q Address : _____
- q Postcode and City : _____

Housing

Do you rent the apartment or house you live in? YES/NO

If so, did you received in 2011 a rent allowance (huurtoeslag) YES/NO If so, please send a copy

Do you own the apartment/ house in which you live YES/NO

If so, please complete the below questions

- q Value according to the council valuation (WOZ-beschikking) as at 1 January 2010 (please attach a copy)* : € _____
- q Mortgage interest paid (not the redemption of mortgage) (Please attach a copy) : € _____
- q Remainder of loan at the end of the year(Please attach a copy of the annual statement) : € _____
- q If applicable, the annual lease (erfpacht) paid in 2011 : € _____
- q Exempt gifts received for the acquisition, maintenance, improvement or debt repayment of your home. Please attach a copy of the deed. : € _____

*)If you temporarily had two main residences (not a second house): please attach both (woz) valuations

- q Is the empty (new) home intended solely to serve as your main residence within two years? : If so, please also indicate the interest and suchlike as with your main residence
- q Was the empty (former) home vacated less than two years ago in 2011? : If so, please indicate the date that the former private residence was vacated and a statement of the interest and suchlike as with your main residence
- q Is the former private residence temporarily rented in anticipation of sale? : If so, then please indicate the rental period.

If you bought or sold a house in 2011:

- q A copy of the notarial statement from the purchase/the sale of the house
- q Valuation costs for mortgage contract : €
- q From which date have you lived in the new house? :

If you have refinanced your main residence in 2011:

- q Details of expenditure for improvement or maintenance of your main residence.

Have you used savings - or a life annuity to redeem your mortgage?

- q If so: please attach a copy of the policy (not the quote!).

Do you have a "blocked" investments or savings account for the repayment of the loan?

- q If so, please supply a copy of the agreement, unless you have already provided us with this.

Listed building

Is your home a listed building? If so, then

- q A copy of the registration with the listed buildings registry, unless you have already provided us with this
- q An overview of the costs: maintenance costs, expenses such as the owner's share of the property tax, insurance, and other municipal charges
- q A statement of received, to receive and pledged subsidies (send decisions)

Other real estate

Second Home

Do you own a holiday home or a second home in the Netherlands or in another country?

If so, please specify:

- q The address(es)
- q The market value free of rent (not the woz valuation) of the property as per 1/1/11 and 31/12/11. Please note, that if the house is available to third parties for less than 70% of the year, also specify the value

Address holiday home, Second home	Value*) as per 01-01-2011 (€):	Value*) as per 31-12-2011 (€):

Historic buildings

Do you own an historic building? If so, then please attach:

- q The address(es);
- q Copy of the declaration that the building is listed;
- q The market value(s) free of rent as per 1 January 2011 and 31 December 2011;
- q Details of maintenance costs, and if you reside at this address the expenses paid with respect to the property (i.e. the property tax, insurances and local government charges);
- q Subsidies granted (received or yet to be received).

Address	Value* as at 01-01-2011 (€):	Value* as at 31-12-2011 (€):

Other real estate

Do you own other real estate in the Netherlands or in another country? If so, please specify:

- q The address(es)
- q The market value as per 1 January 2011 and 31 December 2011

Address(es)	Value *) as per 01-01-2011(€):	Value *) as per 31-12-2011 (€):

*) This is the market value of the property by an optimal sale, free from rent. This is not the WOZ-valuation!

Provision assets to associated persons

Did you provide assets to associated persons, company or limited? YES/NO

If you have provided assets to a company or limited of an associated person, then you must declare the profits and losses gained from the provision as other income.

If applicable please contact us for further details.

Other assets and debts (in the Netherlands and outside the Netherlands)

Bank accounts and debtors

- q The balance of all current and savings accounts as per 1 January and 31 December 2011 (please attach annual statement)
- q The balance of the debts owed to you as per 1 January 2011 and 31 December 2011 (please specify)

Stocks and other investments

- q An overview of your portfolio value as per 1 January 2011 and 31 December 2011
- q Dividend tax withheld in 2011
- q A copy of endowment insurance policy (to assess whether an exemption applies)
- q An overview of your venture capital investments and/or eco investments.

Other assets, NOT for personal use

- q Examples: furniture in your rental property, a boat
- q The values as per 1 January 2011 and 31 December 2011

Art and other collections (as investment)

- q Examples: art collection, classic car collection
- q The values as per 1 January 2011 and 31 December 2011

Debts

- q All debts such as debt for the purchase of a second home, boat, caravan, loans, credit card companies, warehouses, suppliers of gas, water, Electricity, internet and Telephone etc.
- q An overview of the values as per 1 January 2011 and 31 December 2011

Personal allowance/ tax deductions

Medical Expenses

Did you receive a health care allowance in 2011 YES/NO if so please provide a copy

If you paid a substantial amount for medical expenses and these costs were not reimbursed by your health insurance, these costs may be tax deductible e.g. physician, hospital or medication costs.

Please note, a tax bracket is applicable.

- q Please send us a specification

Study costs

Did you or your spouse/partner incur costs for further education to improve your/ their current position, or study for a new profession? YES/NO

If so, and the net costs (minus reimbursements) are over € 500 these net costs may be tax deductible.

- q Please send us a specification

Alimony

Did you pay alimony to your ex-spouse(not the amount of alimony you pay for your children)? YES/NO

If so, please specify

- q The amount paid in 2011
- q Name, address of the ex-spouse

Annuities

Did you make annuity payments in 2011? YES/NO

If so, please specify

- q The amount paid 2011
- q The amount paid up to 1 April 2012
- q A copy of the policy
- q A copy of the 2010 pension overview (If applicable).

Disability insurance

Did you make payments for disability insurance in 2011? YES/NO

If applicable, please attach

- q The premiums paid in 2011
- q A copy of the policy

Gifts

Did you make any donations to charitable institutions, YES/NO
if so please specify the organisation(s) and the amount paid

Child support

Did you pay more than € 408 a quarter to support your child(ren)? YES/NO
If so, please specify the amount paid, name(s) of the child(ren) and the date(s) of birth.

Please note. If you are entitled to child support and/or the child(ren) live(s) with you the above is not applicable

Other information

If the below circumstances occur, we advise you to contact us. There might be tax implications.

- q You have a business or are starting a business (i.e. self-employed);
- q You are a stakeholder in a business;
- q You have sold your old house and bought another house;
- q You own more than 5% of the shares in a company;
- q You rent real estate or have lent money to the business of a family member or partner;
- q You rent out a property (with rent control);
- q You are divorced or will divorce in 2011.;
- q You will divorce shortly or live separately;
- q You live with your partner or will shortly;
- q You are the owner of the property in which your parents live;
- q You are a co-parent
- q You have received an inheritance or gift this year, or you have yourself given a gift;
- q You are entitled to an (undistributed) share in an inheritance;
- q You have shares, assets, entitlements or liabilities for which any income derived from these must be treated as reward for work performed;
- q You have assets separated into so-called private equity or you are the heir of someone who has done this.

Please note:

We need your information to be as complete and correct as possible, so that we can prepare your tax return as accurately as possible.

If you have any questions or doubts, please do not hesitate to contact us

Tel 020 - 3445900

Fax 020 - 3445901

E info@koppelbelastingadvies.nl

We do not accept any responsibility if the provided information by you is incorrect or incomplete

To my knowledge I have completely and faithfully completed the above tax questionnaire and provided the requested attachments.

Date:

..... (name + signature)