

Documents needed tax return 2021

Basis

- ✓ All annual statements from you and your partner
- ✓ Also annual statement from applicable benefits or pensions
- ✓ Annual statement provisional refund 2021 of all "Toeslagen"
- ✓ Annual statement of provisional income tax refund 2021
- ✓ Possible paid tax assessment for 2021
- ✓ Premium paid for your own pension in 2021 + the factor A (see Uniform Pension Overview UPO)
- ✓ Any high medical costs paid in 2021 that are not reimbursed by the health insurance company
- ✓ Donations
- ✓ Study costs

You have your own company

- ✓ Annual figures 2021

You have your own house

- ✓ Annual statement interest and balance Mortgage Bank
- ✓ Property valuation 2020 (WOZ value 2020)
- ✓ Any mortgage conversion costs in 2021

You purchased a house in 2021

- ✓ Notary settlement for the purchase of the house
- ✓ Valuation bill
- ✓ Architectural research bill
- ✓ Brokerage and/or advice bill for mortgage
- ✓ Annual statement mortgage bank 2021

You sold a house in 2021

- ✓ Notary settlement for the sale of your house
- ✓ Bill from selling real estate agent
- ✓ Annual statement old mortgage bank 2021

You are divorced

- ✓ Partner alimony (paid or received)

You have assets

- ✓ All credits on savings / payment / investment accounts on January 1, 2021
- ✓ Balances on savings account from your employer (no longer tax-free since 2020)
- ✓ Value capital insurance on January 1, 2021
- ✓ Value of a possible 2nd house