

## Procedure

### Submitting your data:

We request you to fill in the inventory form below and submit it together with your details as follows:

- As upload in *Mijn Digimap* on the Omnis Financieel Advies website
  - Up to 10 MB;
  - In pdf format;
- By email to [fiscaal@omnisadvies.nl](mailto:fiscaal@omnisadvies.nl):
  - Up to 10 MB per mail;
  - In pdf format;
- By regular mail to Merwede 26, 8226 NA00 AB Lelystad:
  - **Please do not send original documents**, only copies;
  - Do not copy on both sides.

### Processing your tax return:

We process the tax returns in order of entry. After receiving your data you will receive an indication of the processing time. If your declaration needs to be handled with priority please contact us. The extra costs for priority treatment are € 62,50.

### Authorization code:

Once we have received all your documents, we will request an authorization code for you from the tax authorities. With this code we get insight into your data at the tax authorities. The code is sent by post to your home address, usually it takes 2 to 4 weeks. Would you like to email us the authorization code a.s.a.p.

### Personal meeting for tax declaration:

We would like to go over your declaration in person at our office. This also gives you the opportunity to ask other questions, for example about your pension, mortgage or insurances. There are no additional costs associated with this meeting.

### Delay:

We request a delay for submitting the tax declaration for all our clients. This delay also applies to the allowances (health care allowance, childcare allowance, rent allowance and child-related budget). The declarations for 2021 must be submitted before May 1<sup>st</sup> 2023. This gives us sufficient time to process your tax declaration carefully.

### Submitting data after March 1<sup>st</sup> 2023:

We aim to process all the declarations in 2022. This is only possible if all the information is delivered on time. When we receive your information later than March 1<sup>st</sup> 2023, we charge an extra fee of € 62,50 for processing your declaration with priority.

### Tax interest:

If the income tax 2020 declaration is done before May 1<sup>st</sup> 2022, no tax interest is levied on the amount that you have to pay to the tax authorities. If the declaration is done after May 1<sup>st</sup> 2022, the tax office charges tax interest on the amount due from 1 July 2022. The interest rate is 4% on an annual basis.

**Payment of the declaration:**

If you do not have a service subscription with a return module, you will receive an invoice from us after filing the declaration. The costs are including VAT:

o Income tax return single	€ 115,00
o Income tax return tax partners	€ 150,00

The costs (including VAT) for additional work are:

o For requesting or changing allowances	€ 50,00
o For requesting or changing provisional returns	€ 77,50
o Extra costs priority treatment tax declaration	€ 62,50
o Extra costs when data is received after March 1 <sup>st</sup> 2023	€ 62,50
o Assisting with information requests from tax office	* hourly rate
o Lodge a complaint with the tax office	* hourly rate

**Inventory form**

Name : .....

Phone during daytime : .....

E-mail address for sending tax return: .....

IBAN Bank account (if incorrect on the tax form): .....

What is your marital status:  single  living together  
 married  registered partner

Date of birth of the youngest child: .....

Number of minor children living at home: .....

Would you like to personally discuss the declaration at our office?  Yes  no

**The information below we always need to receive:**

- Annual statements of all incomes;
- Annual statements with the value on January 1st 2021 of all bank- and savings accounts, investment accounts and other investments and properties, on your name, your partner's name or children under the age of 18 (in The Netherlands and abroad);
- When living together unmarried, what applies:
 

	yes	no
Registered partnership (according to Dutch law)?	<input type="checkbox"/>	<input type="checkbox"/>
Both of you registered on this address at the community office?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a notarized agreement (samenlevingsovereenkomst)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a child together?	<input type="checkbox"/>	<input type="checkbox"/>
Have you accepted (erkenning) a child from the other partner?	<input type="checkbox"/>	<input type="checkbox"/>
Are you partners in each other's pension plans?	<input type="checkbox"/>	<input type="checkbox"/>
Do you both own your home together?	<input type="checkbox"/>	<input type="checkbox"/>
Were you registered as fiscal partners last year?	<input type="checkbox"/>	<input type="checkbox"/>
- Has your marital status changed in 2021. If yes, what has changed?.....
- Have you changed employers or has there been another change in your working situation in 2021?.....
- Are you retiring in 2021 or 2022?.....
- Do you expect donations or inheritances in the coming years?.....

**The information below we need to receive, if this applies:**

- If we have not submitted the tax return 2020: copy tax return 2020;
- "Voorlopige aanslag inkomstenbelasting 2021" (provisional monthly tax return, copies of both sides);
- Received or paid partner of child alimony;
  - Name and address of the partner and or children;
- Paid life annuity payments;
- Paid donations in 2021;
- Balance on januari 1<sup>st</sup> 2021 of loans, and the name the loans are on. If the loan is used for financing, improving or maintaining you home, please indicate this. In this case please send us the annual statement including paid interest;
- An overview of investments that are invested "socially" or invested in "dufkapitaal";
- Value of second home/real estate property and the debts regarding these properties;
- Overview costs monumental house;
- Donations made;
- Costs of studies;
- Overview of your part in undivided inheritances;
- Annual premium for (Dutch) life annuity or disability insurance;
- A-factor for 2020, which you have received from your pension fund;

Your house:

- Paid mortgage interest and the outstanding debts on december 31<sup>st</sup> 2021 (annual statement mortgage and loans);
- Paid ground lease (erfpacht, recht van opstal) in 2021
- If you have loans with third parties for your house, we need the "renseigneringsformulier" which needs to be submitted to the tax office;
- If part of the loan is used for consumption (not the house), please indicate what amount;
- When a house has been purchased or sold, notary "afrekening";
- For other costs made regarding the above transaction, that are not on the "afrekening", please send copies of these invoices;
- The WOZ-value of your house per peildatum january 1<sup>st</sup> 2020 (aanslag gemeentelijke belastingen 2021);
- Moving date (registration date at the town/city hall);
- Overview of costs of home improvements;
- Overview of the assets of the VVE per january 1<sup>st</sup> 2020 (Association of Owners) showing your share.

Health care costs:

- Overview of non refunded costs (e.g. dentist, prescribed medicines, physiotherapy);

Costs for glasses, lenses or additional health care insurances are not tax deductible. You do not have to supply information about these costs.

"Toeslagen":

- Annual statements for children's daycare;
- Letter tax office regarding "kinderopvangtoeslag 2020" to be received;
- Letter tax office regarding "zorgtoeslag 2020" to be received;
- Letter tax office regarding "huurtoeslag 2020" to be received;
- Letter tax office regarding "kindgebonden budget 2020" to be received;

Additional questions:

- If you have a mortgage that Omnis did not advise, when does the chosen fixed interest rate period end?.....
- Do you own investment insurances that are not known to us? Please send us a copy of this policy;.....
- Do you have life annuity insurances that are not known to us? Please send us a copy of this policy;.....
- Are you retiring soon? Please send us an overview of your pension income, for example the most recent "Uniform Pensioen Overzichten (UPO's)" or a print from [www.mijnpensioenoverzicht.nl](http://www.mijnpensioenoverzicht.nl).  
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Additional remarks:

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