

## Procedure

### Submitting your data:

We request you to fill in the inventory form below and submit it together with your details. We prefer an upload in your personal space in your Omnis Digimap.

- As upload in your [Omnis Digimap](#)
  - 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 NA 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 € 70,00.

### Authorization code:

We use authorization codes. Once we have received your documents, and the authorization codes are not available yet, we will request these 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 2022 must be submitted before May 1<sup>st</sup> 2024. This gives us sufficient time to process your tax declaration carefully.

### Submitting data after March 1<sup>st</sup> 2024:

We aim to process all the declarations in 2023. This is only possible if all the information is delivered on time. When we receive your information later than March 1<sup>st</sup> 2024, we charge an extra fee of € 70,00 for processing your declaration with priority.

### Tax interest:

If the income tax 2022 declaration is done before May 1<sup>st</sup> 2023, 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> 2023, the tax office may charge tax interest on the amount due from 1 July 2023. At this moment, the interest rate is 4% annually.

**Payment of the tax declaration:**

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

o Income tax return single for existing customers	€ 127,50
o Income tax return tax partners for existing customers	€ 165,00
o Income tax return for new customers, from	€ 300,00
o Additional costs for including enterprise	* hourly rate
o For requesting or changing allowances	€ 55,00
o For requesting or changing provisional returns	€ 85,0
o Extra costs priority treatment tax declaration	€ 70,00
o Extra costs when data is received after March 1 <sup>st</sup> 2023	€ 70,00
o Assisting with information requests from tax office	* hourly rate
o Submitting a complaint to the tax office	* hourly rate



Your house:

- Paid mortgage interest and the outstanding debts on december 31<sup>st</sup> 2022 (annual statement mortgage and loans);
- Paid ground lease (erfpacht, recht van opstal) in 2022
- 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> 2021 (aanslag gemeentelijke belastingen 2022);
- 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> 2022 (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 2022” to be received;
- Letter tax office regarding “zorgtoeslag 2022” to be received;
- Letter tax office regarding “huurtoeslag 2022” to be received;
- Letter tax office regarding “kindgebonden budget 2022” 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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