

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:
 - 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 € 72,50.

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 1st 2024. This gives us sufficient time to process your tax declaration carefully.

Submitting data after March 1st 2025:

We aim to process all the declarations in 2024. This is only possible if all the information is delivered on time. When we receive your information later than March 1st 2025, we charge an extra fee of € 72,50 for processing your declaration with priority.

Tax interest:

If the income tax 2023 declaration is done before May 1st 2024, no tax interest is levied on the amount that you have to pay to the tax authorities. If the declaration is done after May 1st 2024, the tax office may charge tax interest on the amount due from 1 July 2024. 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	€ 130,00
o Income tax return tax partners for existing customers	€ 170,50
o Income tax return for new customers, from	€ 310,00
o Additional costs for including enterprise	* hourly rate
o For requesting or changing allowances	€ 57,50
o For requesting or changing provisional returns	€ 86,50
o Extra costs priority treatment tax declaration	€ 72,50
o Extra costs when data is received after March 1st 2023	€ 72,50
o Assisting with information requests from tax office	* hourly rate
o Submitting a complaint to the tax office	* hourly rate



Inventory form

Name :						
Phone du	uring daytime :					
	Idress for sending tax return:					
IBAN Bank account (if incorrect on the tax form):						
What is y	our marital status:	□ single	□ living together			
		□ married	□ registered par	tner		
Date of b	oirth of the youngest child:	•••••		•••••		
Would yo	ou like to personally discuss the declaration a	t our office? $\qquad \square$	Yes □ no			
The info	rmation below we always need to receive:					
	Annual statements of all incomes;					
	Annual statements with the value on Januar other investments and properties, on your r Netherlands and abroad);		_			
	When living together unmarried, what appli	es:		yes	no	
	Registered partnership (accord	ing to Dutch law)	?			
	Both of you registered on this					
	Do you have a notarized agree	ment (samenlevir	ngsovereenkomst)?			
	Do you have a child together?					
	Have you accepted (erkenning		other partner?			
	Are you partners in each other					
	Do you both own your home to Were you registered as fiscal p	-				
	Has your marital status changed in 2023 If yes, what has changed?					
	Are you retiring in 2024 or 2025?					
	Do you expect donations or inheritances in	the coming years	?			•••••
The info	rmation below we need to receive, if this ap	olies:				
	If we have not submitted the tax return 202		2022:			
	"Voorlopige aanslag inkomstenbelasting 2023" (provisional monthly tax return, copies of both sides);					
	Received or paid partner of child alimony;	.,	, , , ,		,,	
_	Name and address of the	e partner and or o	hildren;			
	Paid life annuity payments;	•				
	Paid donations in 2023;					
	Balance on january 1 st 2023 of loans, and the	e name the loans	are on If the loan is us	ed for fin	ancing improv	ving or
_	maintaining you home, please indicate this.					71116 01
	interest;				0	
	An overview of investments that are investe	d "socially" or inv	vested in "durfkapitaal"	' :		
	Value of second home/real estate property					
	Overview costs monumental house;		and amb three properties	<i>-</i> ,		
	Donations made;					
	,					
	Overview of your part in undivided inheritar					
	Annual premium for (Dutch) life annuity or o	-				
	A-factor for 2022, which you have received	from your pension	ո fund;			



<u>Your hoυ</u>	<u>ise:</u>
	Paid mortgage interest and the outstanding debts on December 31st 2023 (annual statement mortgage and loans);
	Paid ground lease (erfpacht, recht van opstal) in 2023
	If you have loans with third parties for your house, the outstanding debt on December 31st 2023 and the paid interest;
	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 1st 2022 (aanslag gemeentelijke belastingen 2023);
	Moving date (registration date at the town/city hall);
	Overview of costs of home improvements;
	Overview of the assets of the VVE per january 1st 2023 (Association of Owners) showing your share.
<u>Health c</u>	are costs:
	Overview of non refunded costs (e.g. dentist, prescribed medicines, physiotherapy);
	Contribution for Diabetes Vereniging Nederland.
	r glasses, lenses or additional health care insurances are not tax deductible. You do not have to supply information lese costs.
<u>"Toeslag</u>	<u>nen":</u>
	Annual statements for children's daycare;
	Letter tax office regarding "kinderopvangtoeslag 2023" to be received;
	Letter tax office regarding "zorgtoeslag 2023" to be received;
	Letter tax office regarding "huurtoeslag 2023" to be received;
	Letter tax office regarding "kindgebonden budget 2023" to be received;
<u>Addition</u>	al 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 .
<u>Addition</u>	al remarks: