



Income Tax Return Checklist 2025

For the preparation of your 2025 income tax return, we require your information. In order to enable you to provide this information in a clear and as complete a manner as possible, we have drawn up the checklist below. We kindly request that you send us the requested information and documents.

Personal details

- Copy of a valid identification document of yourself and, if applicable, your partner (front and back)
- Citizen Service Number (BSN) of yourself and, if applicable, your partner
- Date of birth of yourself and, if applicable, your partner

Income

- Annual income statement 2025 or salary slips
- Received partner alimony
- Income from work not performed in paid employment, such as income from self-employment (administration)

Bank accounts

- Annual statement 2025 of your current account
- Annual statement 2025 of your savings account and those of your children
- Annual statement 2025 of investments

Housing

- The 2025 WOZ assessment of your owner-occupied home with valuation date 1 January 2023, which you received at the beginning of 2025
- Annual statement of the mortgage loan
- Any notary settlement statement upon purchase or sale of the home

Deductible expenses

- Proof of payment of charitable donations
- Proof of payment of medical expenses not reimbursed (The personal contribution under the Health Insurance Act, health insurance premiums, and deductible excess are not deductible)
- Proof of payment of paid partner alimony

Other

- Details of loans and other debts
- Details of receivables (including receivables from children)
- Details of paid annuity insurance premiums
- Overview of paid disability insurance premiums (AOV)
- Details regarding dividends
- WOZ value of a second home
- Value of your cryptocurrency holdings as of 1 January 2025



If applicable

- The provisional income tax assessment for 2025
- The provisional assessment for the income-dependent contribution under the Health Insurance Act for 2025

Application for pre-filled tax return (VIA)

Based on your personal details, we will request a so-called pre-filled tax return (VIA) from the Dutch Tax and Customs Administration. After this request, you will receive a letter from the Tax Authorities containing an activation code. Could you please send us this activation code upon receipt?

Additional information

This questionnaire covers only the most common situations. We kindly request that you inform us of any matters not included in this form that may nevertheless be relevant for your tax return. Please contact us if you have any doubts. It is better to ask one question too many than to submit an incorrect tax return.

We recommend that you contact us in any case if one of the following situations applies to you:

- You operate a business or have started a business (for example as a self-employed person).
- You are a co-owner or partner in a business.
- You have received an inheritance or a gift, or you have made a gift yourself.
- You are entitled to a (undivided) share in an inheritance.
- You hold shares, receivables, rights, or debts where the benefits obtained are assumed to be partly a remuneration for work performed.
- You have placed assets in a segregated private estate, or you are an heir of someone who has done so.