



**Questionnaire
Tax Return Information for Individuals**

Personal Information (both spouses)			
Last Name	First Name(s)	Marital Status	Nationality
Date of Birth	Occupation	Employer	Part-Time Jobs (Employer)
Phone	Residence	Address	Religion (if registered)
H			
W			
M			

Children				
Last Name	First Name(s)	Date of Birth	Occupation	Address

Other Dependents					
Last Name	First Name	Date of Birth	Amount of Support	Address	Nature of your Support

Other Important Information	
Arrival Date / Date of Residence Registration	
Departure Date (definite or expected)	
Notes:	

Please include a copy of your last tax return, if possible

Worldwide Income

Income Source	Information Required	Documents to Attach
Income from self-employment	<ul style="list-style-type: none"> ▪ Profit / loss 	<ul style="list-style-type: none"> ▪ Balance sheet and income statement ▪ Statement of private account
Income from employment		<ul style="list-style-type: none"> ▪ Salary compensation statement from your employer (if none: break-down of income and deductions for social security)
Part-time jobs		<ul style="list-style-type: none"> ▪ Salary statement ▪ Income and expense confirmation ▪
Compensation for non-employment		<ul style="list-style-type: none"> ▪ Confirmation (unemployment insurance, sick pay insurance)
Other compensation	<ul style="list-style-type: none"> ▪ Director's fees ▪ Attendance fees 	<ul style="list-style-type: none"> ▪ Confirmation
Pensions and annuities	<ul style="list-style-type: none"> ▪ AVS (social security) ▪ Pensions (beginning/end of pension contract) ▪ Other pensions and annuities 	<ul style="list-style-type: none"> ▪ Bank credit advise ▪ Confirmation ▪ Confirmation
Investment income	<ul style="list-style-type: none"> ▪ Interest and income 	<ul style="list-style-type: none"> ▪ Bank statements ▪ Exact data showing income per year and year-end balance ▪ Shares, options, funds ▪ Interest received on loans and other outstanding debits
Investment from real-estate	<ul style="list-style-type: none"> ▪ If privately used ▪ If rented 	<ul style="list-style-type: none"> ▪ Rental value ▪ Details of rental income
Inheritance proceeds		<ul style="list-style-type: none"> ▪ Income from estates
Alimony received	<ul style="list-style-type: none"> ▪ Not taxable for children over 18 years 	<ul style="list-style-type: none"> ▪ Bank credit advise or confirmation
Lottery Winnings		<ul style="list-style-type: none"> ▪ Confirmation ▪ Related expenses ▪ Documents
Other Income		<ul style="list-style-type: none"> ▪ Confirmation ▪ Related expenses ▪ Documents
Capital settlements	<ul style="list-style-type: none"> ▪ Origin, financing 	<ul style="list-style-type: none"> ▪ Confirmation

Deductions

Expenses	Information Required	Documents to Attach
Permanent expenses		<ul style="list-style-type: none"> ▪ Life annuity (confirmation)
AVS-contribution of non-working individuals		<ul style="list-style-type: none"> ▪ Confirmation, invoices, vouchers
Transportation Expenses	<ul style="list-style-type: none"> ▪ Car or public transport? 	<ul style="list-style-type: none"> ▪ Kilometres between home and office or monthly tram/train passes
Meals and expenses away from home	<ul style="list-style-type: none"> ▪ Weekly residents? 	
Other compensation	<ul style="list-style-type: none"> ▪ Director's fees ▪ Attendance fees 	<ul style="list-style-type: none"> ▪ Confirmation
<ul style="list-style-type: none"> ▪ Un-reimbursed business expenses ▪ Fees in connection with day care 	<ul style="list-style-type: none"> ▪ Education, books, dues for professional societies 	<ul style="list-style-type: none"> ▪ Statements, invoices, vouchers
Investment expenses	<ul style="list-style-type: none"> ▪ Bank charges, etc. 	<ul style="list-style-type: none"> ▪ Bank statements
Qualified private pension contributions	<ul style="list-style-type: none"> ▪ 3rd pillar ▪ 2nd pillar (purchase of missing contribution years) 	<ul style="list-style-type: none"> ▪ Confirmation ▪ Confirmation
Alimony	<ul style="list-style-type: none"> ▪ No deduction for children over 18 years 	<ul style="list-style-type: none"> ▪ Confirmation ▪ Bank debit advise
Charitable contributions		<ul style="list-style-type: none"> ▪ Statements
Property expenses / investments	<ul style="list-style-type: none"> ▪ Maintenance costs ▪ Repairs 	<ul style="list-style-type: none"> ▪ Original invoices
Interest paid	<ul style="list-style-type: none"> ▪ Debit interest ▪ Mortgage interest ▪ Interest on loans ▪ Interest on building rights ▪ Interest on late tax payments 	<ul style="list-style-type: none"> ▪ Bank and credit card statements ▪ Interest statements ▪ Interest statements ▪ Interest statements ▪ Tax invoice
Health costs		<ul style="list-style-type: none"> ▪ Invoices (doctor, dentist, optician, etc.) and statements from medical aid ▪
Gifts	<ul style="list-style-type: none"> ▪ Received or made 	<ul style="list-style-type: none"> ▪ Confirmation / statement ▪
Capital settlements		<ul style="list-style-type: none"> ▪ Confirmation ▪

**Worldwide Wealth
(on December 31st or date of departure)**

Other Assets	Information Required	Documents to Attach
Property / real estate	<ul style="list-style-type: none"> ▪ Cost price, year of purchase) ▪ Location, description ▪ Tax or market value 	<ul style="list-style-type: none"> ▪ "Cadastral statement"
Investments	<ul style="list-style-type: none"> ▪ Securities and other investments ▪ Accounts ▪ Employees' shares / options ▪ Loans granted 	<ul style="list-style-type: none"> ▪ Statements
Children's wealth	<ul style="list-style-type: none"> ▪ Wealth of children under 18 years (children over 18 years tax their own wealth and income) 	<ul style="list-style-type: none"> ▪ Statements
Precious metals; cash		
Life Insurance	<ul style="list-style-type: none"> ▪ Details of insurance (surrender value / re-purchase value) 	<ul style="list-style-type: none"> ▪ Confirmation ▪ Insurance Policy
Other assets	<ul style="list-style-type: none"> ▪ Automobiles ▪ Collections ▪ Paintings ▪ Etc. 	<ul style="list-style-type: none"> ▪ Supporting documents
Usufruct		

Debts / Liabilities)

Type of Debt	Information Required	Documents to Attach
<ul style="list-style-type: none"> ▪ Bank and credit card debts ▪ Mortgages 		<ul style="list-style-type: none"> ▪ Statements
Loans		<ul style="list-style-type: none"> ▪ Contracts, etc.
Tax Liabilities		