

DATA FOR THE 2023 INCOME TAX RETURN.



(Important: Fill in all the sections)

LAST NAME, FIRST NAME: _____ **DATE:** _____

IDENTITY DOCUMENT: (DNI, NIE, please send image of both sides) _____

MARITAL STATUS: Single Married Widower De Facto

ADDRESS: Property is OWN RENTED

Address: _____

Postal Code: _____ Population _____ Cadastral Ref.: _____

If the **property is** owned: Mortgage for the main residence. **NO YES**

Attach Home Insurance + Life Insurance Linked to Mortgage.

Year of Mortgage: (_____)

If the **property is rented:** Rental contract. Landlord DNI/NIE number.

Registration at the new address? Otherwise

Contact Phone Number & Email:

- (_____/_____)

- (_____/_____)

Box 505, of the income for the year 2022. (_____)

2022 Income Tax Return.

A.- FAMILY SITUATION DATA:

In the case of a married spouse's DNI/NIE. _____

Descendants and/or ascendants DOCUMENTATION OF CHILDREN, PEOPLE WITH DISABILITIES, OR DEPENDENTS (Family Book, Large Family Certificate, DNI, etc.).

SEPARATION OR DIVORCE, (document accrediting custody or maintenance, ONLY VALID, the document of final judgment of the court is not valid verbal agreements, nor private documents, or notarial.)

COMMON-LAW couples with children. Each one declares 50% of the descendants. **YES** **NO**

Others live with dependent family members in the same address (certificate of registration of the cohabitants and NIE/DNI and tax data of the person).

INVOICES AND PROOF OF PAYMENT FOR ALL MEMBERS OF THE FAMILY UNIT.

Private Physician Expenses (Not Pharmaceutical Expenses)

Purchase of school supplies/enrolments/purchase of uniforms, school canteen, etc. (Nurseries, schools, or institutes)

Life insurance, pension plan, in case of autónom@s, private health insurance

Properties (Immovable) (other than primary residence), Rented **YES** **NO** Rental contract and collections.



B.- ECONOMIC DATA

- Paid employment **YES** **NO** Self-employment **YES** **NO**
- Work Abroad. Certificates of income.
- GRANTS, SUBSIDIES AND OTHERS
- Received and paid by the Mutual Society. - Proof of income during 2023
 - Severance pay. - SEMAC ballot with sentence.
 - Extension of the flat rate of the self-employed quota. - Proof of income for the year 2023 of the refunds.
 - Rental Aids. - Proof of income
 - Social benefits. - Specify: (which) _____
 - Minimum Vital Income. -
 - Purchase of vehicles with government aid (Move Plan or other)
 - Tax Agency Aid example €200 for people with low income/other income
 - Other: _____

	BANK	ACCOUNT	NUMBER	(return	or	payment)	IBAN:
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- Properties or bank accounts outside Spanish territory. **NO** **YES** Documentation
- Purchase and sale of real estate, shares, participations or other assets. **NO** **YES** Documentation
- Winnings from online games, games of chance, lotteries, etc. **NO** **YES** Documentation
- Participation in companies, communities of property or civil partnerships. **NO** **YES** Documentation
- Cryptocurrencies or other types of virtual currencies **NO** **YES** Documentation

C.- OTHER DOCUMENTATION OF INTEREST

- Renovation works to improve energy efficiency in both habitual and rented homes. (Energy Efficiency Certification)
- Communicative or sanctioning notifications from the AEAT.
- Any documentation that the client deems appropriate.

I DECLARE THAT THE DATA AND DOCUMENTS PROVIDED FOR THE PREPARATION OF THE PERSONAL INCOME TAX RETURN are true, I am responsible for the veracity of the documents that accompany this application and I confirm my willingness to sign it.

AUTHORIZER'S SIGNATURE



PROTECTION OF PERSONAL DATA

Purpose of data processing

The Advisor may only access and use the Client's personal data and documents in accordance with the Client's instructions and will not apply or use them for any purpose other than the provision of the services described. The Client is informed, in accordance with Article 13 of Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016, hereinafter GDPR, that the data and documents provided by the Client, which are necessary and essential to process the contracted services, are incorporated into files owned by the Advisor. for the purpose of managing the services described, as well as for the billing of The Advisor. All this based on the assignment you have entrusted to us.

Processing of special categories of personal data

In the event that the Client provides data of special protection in accordance with Article 9 of the GDPR, such as data on health, ideology, trade union membership, religion, beliefs, racial origin, health or sex life, as well as data derived from acts of gender-based violence, the Client is informed and expressly consents to the collection and processing of such data for the performance of the entrusted procedures, incorporating them into files owned by them. The advisor will apply the same security measures in accordance with current regulations. The Client may revoke his/her consent to the processing of this data at any time.

Third-party data

By providing us with their personal data, they acknowledge that they are true, accurate, up-to-date, as well as their own. In the event that the Client provides personal data of third parties, he/she declares to have the prior and express consent of the latter to communicate it to us and guarantees that he/she has informed them about the content of the data provided, the existence and purpose of the file where his/her data is contained, the possibility of exercising the rights of access, rectification, cancellation and opposition, as well as the terms established in this data protection document.

Data communication

The consultant will communicate the data and documents necessary for the provision of the agreed services to the competent public administrations, in the event that the client so requests, to the Public Treasury, as well as to other official bodies, both local, regional, and state, necessary to carry out the processing of the services described. if applicable. The advisor will not subcontract to a third party the performance of any processing entrusted to it by the Client, unless it has obtained express authorization to do so from the latter.

Confidentiality and duty of secrecy

The advisor undertakes to comply with the duty of secrecy with respect to personal data, which, in accordance with the provisions of Article 5 (f) of the GDPR, will continue even after the end of the service provision relationship, as well as, where appropriate, after the termination of this service for any reason. The advisor expressly assumes the obligation to implement security measures in accordance with the provisions of Article 32 of the GDPR security measures.

Return of the data communicated

The advisor will return to the Client the data that has been communicated to him/her, as well as any document or support in which any of the personal data subject to the processing is recorded. However, the return of such data will not be appropriate when there is a legal provision that requires its conservation, in which case the advisor must proceed to archive them, guaranteeing their conservation until their prescription.

Information on Article 13 of the General Data Protection Regulation

In the event of any incident regarding your personal data, you may exercise your rights of access, rectification, opposition and other legally established rights at any time, in writing, accompanied by a copy of an official document that identifies you, addressed to Ángel Luis Suárez Montesinos – C/ Noelia Afonso Cabrera no. 7 Edif Despachos Profesionales 2-12 Zentral Center 38650 – Arona – S/C de Tenerife. Email: direccion@asesoriasempresas.es. In the event that you have not obtained satisfaction in the exercise of your rights, you may file a complaint with the Supervisory Authority. You can contact the Spanish Data Protection Agency through the website www.agpd.es. More information on the exercise of rights and data protection on our Website www.asesoriasempresas.com

In Arona, ____ _____ 2024.

CUSTOMER COMPLIANCE SIGNATURE



AUTHORISATION FOR THE ELECTRONIC SUBMISSION OF TAX RETURNS

GRANTS ITS REPRESENTATION SO THAT THE TAX ADVISOR, BY VIRTUE OF THE COLLABORATION AGREEMENT SIGNED WITH THE State Tax Administration Agency, to submit electronically the tax return corresponding to the Personal Income Tax year 2022.

This authorisation is limited to the aforementioned electronic filing and does not confer on the filer the status of representative to intervene in other acts or to receive all types of communications from the Tax Administration on behalf of the taxpayer or interested party, even if these were a consequence of the document submitted.

Likewise, the grantor(s) authorises their personal data to be processed in an automated manner for the exclusive purposes of filing **the tax return by telematic means.**

ACCEPTANCE OF REPRESENTATION

By signing this document, the representative accepts the representation conferred and vouches for the authenticity of the signature of the grantor(s). This representation will only be accredited to the Tax Administration when it requests the representative.

APPLICABLE RULES/

General Tax Law (Law 58/2003) Voluntary representation Article 46

Law on the Protection of Personal Data (Organic Law 15/1999) Right to information in the collection of data. Article 5.

Royal Decree 1065/2007 of 27 July 2007 approving the General Regulations on tax management and inspection actions and procedures and the development of common rules on tax application procedures. Article 79

In..... as of2024

SIGNATURE