

DATA FOR THE 2024 INCOME TAX RETURN.



(Important: Fill in all the sections)

A.- PERSONAL DATA:

NAME: DNI/NIE:

DATE OF BIRTH: TELEPHONE CONTACT: EMAIL:

- (DNI, NIE, please send image of both sides)

MARITAL STATUS: Single Married Widower De Facto Location

ADDRESS: Dwelling is OWN RENTED

Address: _____

Postal code: _____ Population _____ Cadastral Ref: _____

If the **home is owned**: Mortgage Primary residence. **NO** **YES**

Attach Home Insurance + Life Insurance linked to mortgage. Amount: _____ €

Mortgage Year: (_____)

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

Registration in the new address? **NO** **YES**

Box 505, of the income for the year 2023. (_____) **2023 Income Tax Return.**

B.- FAMILY SITUATION DATA:

In case of married option, DNI/NIE of the spouse. NAME, SURNAME _____

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 support, ONLY VALID, the document of final judgment of the court is not valid verbal agreements, nor private or notarial documents.)

UNMARRIED COUPLES with children. Each one declares 50% of the descendants. **NO** **YES**

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

INVOICES AND PAYMENT VOUCHERS OF ALL MEMBERS OF THE FAMILY UNIT.

Private doctor expenses (not pharmaceutical expenses)

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

Life insurance, pension plan, if autónom@s, private health insurance

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

C.- ECONOMIC DATA

Employment **NO** **YES**

Self-employment **NO** **YES**

Work Abroad. Income certificates.



AID, SUBSIDIES AND OTHERS

- Received paid by the Mutual Society. - Proof of income during the year 2023
- Severance pay. - SEMAC ballot with sentence.
- Extension Flat rate of the self-employed fee. - Proof of income for the year 2023 of the refunds.
- Rental Aid. - proof of income
- Social aid. - Specify: (which) _____
- Minimum Vital Income. -
- Purchase of vehicles with government aid (Move Plan or other)
- Tax Agency aid example 200 euros for people with low income/other income
- Other: _____

BANK ACCOUNT (return or payment) IBAN:

□□□□	□□□□	□□□□	□□□□	□□□□	□□□□
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|--|--|
| <input type="checkbox"/> Properties or bank accounts outside Spanish territory. | NO <input type="checkbox"/> YES <input type="checkbox"/> Documentation |
| <input type="checkbox"/> Purchase and sale of real estate, shares, shares or other assets. | NO <input type="checkbox"/> YES <input type="checkbox"/> Documentation |
| <input type="checkbox"/> Winnings through online gambling, gambling, lotteries, etc. | NO <input type="checkbox"/> YES <input type="checkbox"/> Documentation |
| <input type="checkbox"/> Participation in commercial companies, communities of property or civil rights. | NO <input type="checkbox"/> YES <input type="checkbox"/> Documentation |
| <input type="checkbox"/> Cryptocurrencies or other types of virtual currencies | NO <input type="checkbox"/> YES <input type="checkbox"/> Documentation |
| <input type="checkbox"/> DIGITAL-KIT for the self-employed | NO <input type="checkbox"/> YES <input type="checkbox"/> Documentation |

D.- OTHER DOCUMENTATION OF INTEREST

- Rehabilitation works to improve energy efficiency in both habitual and rented homes. (Energy Efficiency Certification)
- Justifications of Donations (donor)
- Receipts of Inheritances received.
- Notifications of communication or sanctions from the AEAT.
- Any documentation that the client considers appropriate and that must be declared.

I DECLARE that the data and documents provided for the preparation of the Personal Income Tax return are true, I take responsibility for the veracity of the documents that accompany this application and I confirm my willingness to sign it.

SIGNATURE OF THE AUTHORIZER



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 instructions of the Client 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, necessary and essential to process the contracted services, are incorporated into files owned by The Advisor, in order to manage the services described, as well as for the billing of The Advisor. All this based on the commission he has 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 Advisor collecting and processing such data in order to carry out 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 consent to the processing of this data at any time.

Data of third parties

By providing us with their personal data, the Client acknowledges 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, they declare that they have their prior and express consent to communicate them to us and guarantee that they have informed them about the content of the data provided, the existence and purpose of the file containing their data, the possibility of exercising their rights of access, rectification, cancellation and opposition, as well as the terms established in this data protection document.

Data communication

The advisor 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 local, regional and state bodies necessary to carry out the processing of the services described, if applicable. The advisor will not subcontract with a third party the performance of any processing entrusted to him by the Client, unless he has obtained express authorization from the latter to do so.

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 termination of the service provision relationship, as well as, where appropriate, after the termination of this service for any reason. The Advisor expressly undertakes the obligation to implement the security measures in accordance with Article 32 of the GDPR.

Return of the communicated data

The advisor will return to the Client the data that has been communicated to him/her, as well as any document or medium containing any of the personal data subject to processing. However, the return of said data will not proceed when there is a legal provision that requires their 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@asesoriamasempresas.es. In the event that you have not obtained satisfaction in the exercise of your rights, you can 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.asesoriamasempresas.com

AUTHORISATION FOR THE SUBMISSION OF RETURNS BY TELEMATIC MEANS

GRANTS ITS REPRESENTATION FOR THE TAX ADVISOR, BY VIRTUE OF THE COLLABORATION AGREEMENT SIGNED WITH THE State Tax

Administration Agency, to file electronically the tax return corresponding to Personal Income Tax for the financial year.

This authorisation is limited to the aforementioned electronic filing without conferring on the presenter the status of representative to intervene in other acts to receive all types of communications from the Tax Administration on behalf of the taxpayer or interested party, even when these were a consequence of the document presented.

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

ACCEPTANCE OF REPRESENTATION

By signing this document, the representative accepts the representation conferred and is responsible 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, approving the General Regulations~~ **Royal Decree 2025** Regulations on tax management and inspection actions and procedures and the development of common rules on tax application procedures. Article 79

SIGNATURE: