

RESIDENTS

PERSONAL DETAILS	RESPONSES – YEAR 2020				
	MONSIEUR	MADAME	DEPENDANT 1	DEPENDANT 2	OTHER DEPENDANT
FULL NAME					
MAIDEN NAME (if applicable)					
Tax number (numero fiscal) and password for online impots.gouv.fr account					
DATE & PLACE OF BIRTH					
CARTE DE SEJOUR NUMBER					
MARITAL STATUS					
ADDRESS IN FRANCE WITH CONTACT NUMBER & Email					
DATE YOU MOVED PERMANANTLY TO FRANCE					
Do you have a TV at your main property as if not you do not have to pay the 138 euros TV licensing fee					

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OWNER OR TENANT OF YOUR HOME and proprietors name if tenant					
Disability registered ? Give details					

PREVIOUS ADDRESS (IF YOU MOVED IN 2020) & DATE OF MOVE					
NEW ADDRESS & DATE (IF PLANNING TO MOVE IN 2020)					

WORLDWIDE REVENUE DETAILS	RESPONSES-YEAR 2020				
	MONSIEUR	MADAME	DEPENDANT 1	DEPENDANT 2	OTHER DEPENDANT
UNEMPLOYMENT INCOME					
STATE PENSION INCOME					
PRIVATE PENSION INCOMES					
PUBLIC/GOVERNMENT PENSION INCOME					
SALARIED INCOME					

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(INCLUDE LAST PAY SLIP 31/12/2020)					
UK BANK INTEREST SHOWING GROSS, TAX & NET					

FRENCH BANK INTEREST (PROVIDE 2561TER CERTIFICATES)					
INVESTMENT INTEREST AND WITHDRAWAL FROM INVESTMENTS SHOWING THE COMMENCEMENT DATE AND IF THE WITHDRAWAL IS A DRAW DOWN ON THE INVESTED FUNDS OR PROFIT OR DIVIDEND					
SALES FROM PERSONAL ASSETS					
WITHDRAWALS FROM PURCHASED ANNUITIES OR PENSIONS					

WORLDWIDE REVENUE DETAILS cont...	RESPONSES-YEAR 2020				
	MONSIEUR	MADAME	DEPENDANT 1	DEPENDANT 2	OTHER DEPENDANT

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PROFESSIONAL REVENUE (SELF EMPLOYMENT)					
PROOF OF BUSINESS REGISTRATION (INSEE DOCUMENT IF IN FRANCE)					
LAST BALANCE SHEET OR INCOME DETAILS FOR last tax year FROM UK BUSINESS					

RENTAL INCOME (INCOME)					
PROPERTY ADDRESS[S]					
RENTED FURNISHED OR UNFURNISHED					
ANNUALLY OR SEASONALLY					
DETAILS OF INCOME RECEIVED IN EUROS AND/OR STERLING					
SPEADSHEET OR DETAILS OF EXPENSES INCURRED RELATING TO THE PROPERTY AS DESCRIBED PREVIOUSLY ABOVE E.G. INSURANCE,					

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REPARATIONS ETC...					
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WORLDWIDE REVENUE DETAILS cont...	RESPONSES-YEAR 2020				
	MONSIEUR	MADAME	DEPENDANT 1	DEPENDANT 2	OTHER DEPENDANT
SEND CERTIFICATES, ATTESTATIONS, DOCUMENTS to Support Credit					
TAX CREDIT DETAILS	You could be eligible for Tax credits or reductions on certain expenses you have had.				
ALIMONY PAYMENTS (SEND COURT CONFIRMATION)					
CHARITABLE DONATIONS PAID IN FRANCE OR ABROAD AND NAME OF THE CHARITY THAT BENEFITED					
REGISTERED FRENCH CHILD CARE FOR CHILDREN UNDER 7 YEARS OF AGE WITH PROOF					
Works classed as energy saving such as wood burner installations, double glazing etc... carried out by a professionally registered tradesman and with a copy of the invoice showing the labour and materials separated. (if you do not					

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have this, your builder needs to be contacted and they can redo the invoice as it is only a percentage of the materials that can be reclaimed)					
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WORLDWIDE REVENUE DETAILS cont...	RESPONSES-YEAR 2020				
	MONSIEUR	MADAME	DEPENDANT 1	DEPENDANT 2	OTHER DEPENDANT
FOREIGN BANK ACCOUNTS					
<p>Every bank outside of France has to be declared to the French authorities whether it is interest bearing or not. To be cautious please give details of all Credit cards, checks and savings accounts. A separate form (form 3916) has to be completed and declared to the fiscal authorities for every account you have. If you prefer you can complete a spreadsheet including the details needed and submit that.</p> <p>There is a risk of a hefty minimum fine per account not declared – Please be aware that the tax offices are checking this information more regularly due to cross border information sharing so please make sure every UK account is declared.</p> <p>Please give the following information for each account you have outside of France :</p>					
NAME OF BANK					
ADDRESS OF BANK					
SORT CODE					
ACCOUNT HOLDER'S NAME					
REGISTERED ADDRESS FOR ACCOUNT					
ACCOUNT NUMBER					

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TYPE OF ACCOUNT					
DATE IT WAS OPENED OR APPROXIMATE DATE IF ACTUAL UNKNOWN					
IF THE ACCOUNT WAS CLOSED IN 2020, THE DATE OF CLOSURE					
YOUR FRENCH IBAN AND BIC CODE FOR ANY REBATES					

Please include also Avis d'imposition 2020 (INCOME 2019) that you received last year – all pages

Please include Copy of the S1 form AND CPAM attestation if you have a state pension

Any additional information – If in doubt please provide any supporting information available. **Thank you.**