

## Questionnaire for the assessment about the obligation and/or convenience to the completion of the 730/2023 tax return form for the fiscal year 2022, the UNICO RW tax return form.

The 730 return tax form can be submitted only by the following persons:

- residents in Italy in the year 2022 and/or 2023.
- subjects who have received income from dependent employment or likewise.
- subjects who do not have any withholding agent who could carry out the balance

LAST NAME: \_\_\_\_\_

NAME: \_\_\_\_\_

RESIDENCE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

1) VERIFICATION FOR THE COMPULSORY AND OPTIONAL COMPLETION OF THE 730 TAX RETURN FORM

<b>Fiscal residency and dependents</b>	<b>YES</b>	<b>NO</b>	<b>NOTES</b>
Have You changed Your residence in the period between 03-11-2022 and 31-12-2022 without communicating the change to Your employer? In case of positive answer to the above question, You <b>must</b> fulfill the 730 tax return form.			
Have you got any dependent that you haven't communicated to your employer yet? (Example: a child born in 2022) In case of positive answer, it is not compulsory to submit the 730 tax return form but it <b>could be useful</b> .			

INCOME received in 2022	YES	NO	NOTES
<p>Have you received, as an employee, any earnings from more than one employer and none of them has made the balance? In case of a positive answer, You <b>must</b> submit the 730 tax return form.</p>			
<p>Have You received any earnings certificated by CU 2023, beyond Your income as an employee, for example any income for occasional freelance jobs? In case of positive answer to the above question, You <b>must</b> fulfill the 730 tax return form.</p>			
<p>Do You own in Italy any lands or real estates other than your main residence? In case of a positive answer, you <b>must</b> submit the 730 tax return form.</p>			
<p>Do you own in Italy any properties that You have put on rent? In case of a positive answer, You <b>must</b> submit the 730 tax return form.</p>			
<p>Have You received any dividend from companies in which you are a partner? In case of a positive answer, you <b>must</b> submit the 730 tax return form.</p>			

<b>EXPENSES AND CHARGES INCURRED in 2022: The compilation of 730 form is not compulsory but could be useful if one of the following situations occurs</b>	<b>YES</b>	<b>NO</b>	<b>NOTES</b>
Have You incurred any medical expenses for yourself or for your dependents for an amount greater than € 129 in the year 2022? (Examples: dentist, medical care exams, etc. ..)			
Have you signed a mortgage for the purchase of your first house?			
Have You got any life insurance policies for death risk or permanent disabilities, equal to or higher than 5%, deriving from any type of reason (excluding sickness insurance for medical expenses' reimbursement or hospitalization)?			
Have You incurred any expenses for yourself or for your dependents for the enrollment in high schools or colleges?			
Have You incurred any funeral expenses for deaths of family members? (even if not dependent)			
Have You incurred any expenses related to sports activities for your children aged between 5 and 18?			
Have you got expenses for public transport services used by you or by any dependent member of your family?			
Have You incurred any expenses for donations to Onlus or NOG (Non Governmental Organizations)?			
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Have You incurred any expenses for your children's kindergarten enrollment (maximum age of the child: 3 years old)?			
Have You autonomously deposited any amount of money to Social Security Funds for the Complementary / supplementary pension?			
Have You paid any support to your ex-spouse pursuant to a Court sentence?			
Have You incurred expenses for building renovation of real estates owned in Italy? (Examples: exterior painting, masonry, external window or door frames, air conditioners, boilers, etc..)			
Have You incurred any expenses for the purchase of furniture and household electrical appliances (class A +) for the home furnishing of a real estate subjected to property renovation?			
Have you incurred any expenses for energy saving measures on properties owned in Italy? (Examples: installing solar panels, condensing boilers, energy saving window frames etc.)			
Have you incurred any rent expenses for the dwelling in which you reside?			

## 2) ASSESSMENT ABOUT THE MANDATORY COMPILATION OF THE UNICO RW TAX RETURN FORM

In case of positive answer (YES) to any of the following questions You have to submit the RW section of the Unico tax form	YES	NO	NOTES
Do You own any lands or properties abroad, for example, in your mother country?			
Do You have any bank account abroad, for example in your mother Country? In case of positive answer, please, indicate the medium amount of Your bank account during the fiscal year 2022, as well as the highest amount owned in 2022 on the above mentioned bank account.			
Do You own any properties for rent abroad?			
Do You own, personally or by means of a TRUST, any financial investments (as, for instance, government securities, bonds, derivative instruments, shares, life insurance or social security policies) abroad?			
Do You own abroad any luxury goods such as yachts, precious jewels, artworks, luxury cars, or precious metals, abroad?			

DATE \_\_\_\_ / \_\_\_\_ / 2023

SIGNATURE

\_\_\_\_\_