



**Wish for receiving copy  
of your tax return and  
invoice:**

- Sending by email (free)  
 Sending by post + 10  
Euros

### Information for 2023 French tax return

Name: \_\_\_\_\_  
Email contact details: \_\_\_\_\_  
Telephone contact details: \_\_\_\_\_

Dear client,

To be able to fill in your 2023 French tax return in the most efficient way, I will please need you to complete this questionnaire:

#### **A- Personal change**

a) Did you move in 2023 or 2024? \_\_\_\_\_ If, yes can you give me **new address of your main residence and the date that you moved:**  
**New address:** \_\_\_\_\_

**Date :** \_\_\_\_\_

b) Did you have any change in your family situation, marriage, PACS, divorce (separation)? If yes date of the events? Details of the person concern (surname and surname at birth, forename(s), date of birth, place of birth)

#### **B- Income in France for each person for the financial year commencing 1<sup>st</sup> January to 31<sup>st</sup> December 2023**

⇒ For non-residents, French income only (except P&L tax option already provided)

Name	Category of income *	Amount	Currency	Deductible expenses	Remarks

\*Salary, interest, dividend, personal pension, state pension, occupational pension, profit, rental income, etc.



**• To benefit from the resident tax calculation for the person that been earning their main income from France (this is for pensioner or working income), you need to justify that your French income represent at least 75 % of your worldwide income. So, your resident tax return may be claimed by the French tax authority to make sure you can benefit from that advantageous tax regime.**

**A CHANGE:** The French government applies on French income for non-residents, 20% tax for income up to 25 710 € and after 30% and 7,50% CSG tax, only for non-resident that lives in the EEA, on property net taxable profit, furnished and unfurnished. Information required on the certificate (attestation sur l'honneur)

Date of health insurance affiliation: \_\_\_\_\_

Country of health insurance affiliation: \_\_\_\_\_

Name of your health insurance corporation: \_\_\_\_\_

Quality of your benefit (employee, self-employed, pensioner, under benefit...): \_\_\_\_\_

**For furnished lettings:** (changes of maximum turnover threshold and deduction rate applicable in 2024 on holiday let, see my newsletter. Any changes need to be discuss and done before end of this year)

⇒ If you declare a furnished summer letting as a MICRO tax option, let me have your 2023 turnover (rent paid without any deduction) in the currency you've received it (€ or \$ or £...):

Are you qualified « meublé de Tourisme » ?  No  Yes, if yes can you let me have your certificate

To keep the flat deduction at 71 % can you let me know if you are qualified “**Meublé de Tourisme**” and registered with “**Etoiles de France**”. For more explanation contacts us, otherwise, the flat deduction will be reduced to 50 %.

a) Address of your secondary residence(s) in France: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**For unfurnished letting:**

⇒ If you declare a long lease rent, please provide me:

- Rental income (copy of the contract)
- Deductible charges:           Maintenance and repairs
  - . Management fees
  - . Insurance
  - . Loan interests
  - . Taxes foncières
  - . Renovation work

(I will appreciate an original or copy of all receipts because, for example, the address and date of the invoices need to be stated in your French tax return)

b) Address(es) of your unfurnished rent residence(s) in France

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**For owner of a French property:**

⇒ Have you declared the occupancy of your French property? If not it is something that we can do for you. It is obligatory to declare it and update it if there been any change.

Do you need to be contacted for the occupancy return  No  Yes

**IMPORTANT:**

I need a copy of your passport or ID documents.

For clients who wish to register their tax correspondence to my office, I need your French bank details (RIB).

**Mandate: By filling and signing this form, I give authority to Advice France – Sarah Vedrenne to submit my return on my behalf. For your 1<sup>st</sup> year, the return will have to be made on paper.**

Date:

Signature: