ANNEX 1

INFORMATION ABOUT THE TAXABLE PERSON - DONOR:

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

(Full name of the taxable person)

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

(Place of residence: place, street, house No.)

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

(Postal code, post office)

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

(Country)

Tax ID No:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |

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

(competent finance office)

**NOTIFICATION OF EXERCISE OF THE RIGHT**

**to deferral of tax liability assessment**

**in donating capital to a spouse or a child**

**1. INFORMATION ABOUT THE GIFT RECIPIENT**

Full name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Residence data

(place, street, house No, post office): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Country: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tax ID No: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The gift recipient is the donor's:

|  |  |
| --- | --- |
|  | spouse/cohabitant |
|  | own child |
|  | adoptee |
|  | stepchild |

**2. INFORMATION ABOUT THE ASSET**

Type of esset:

1. **Immovable property:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Type | Address and other information | Acquisition value\* | Date of acquisition |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
| 5. |  |  |  |  |
| 6. |  |  |  |  |
| 7. |  |  |  |  |
| 8. |  |  |  |  |
| 9. |  |  |  |  |
| 10. |  |  |  |  |

**\* Acquisition value at the time of the acquisition of the property by the donor**

**b) Securities and equity holdings in companies, co-operatives and other legal forms**

**organisation and fund shares:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Type and description of the asset | Quantity | Acquisition value\* | Date of acquisition |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
| 5. |  |  |  |  |
| 6. |  |  |  |  |
| 7. |  |  |  |  |
| 8. |  |  |  |  |
| 9. |  |  |  |  |
| 10. |  |  |  |  |

**\*   Acquisition value at the time of the donor's acquisition of securities, holdings and/or** **fund shares**

Enclosures*(taxable persons must send the form together with the deed of gift, a proof of the date of acquisition and of the acquisition* *value of assets by the  donor and a proof o of the status of the gift recipient)*

In/at \_\_\_\_\_\_\_\_\_\_\_\_\_\_ , date \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(signature of the taxable person)