

Questionnaire for the assessment of the compulsory and/or convenience to the completion of 730/2022 tax return form for fiscal year 2021, the UNICO RW tax return form.

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

- residents in Italy in the year 2021 and/or 2022.
- subjects who have received income from dependent employment or likewise.
- subjects who do not have any withholding agent who could carry out the balance (news of this year).

LAST NAME: _____

NAME: _____

RESIDENCE: _____

EMAIL: _____

EMPLOYER: _____

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

| Fiscal residency and dependents | YES | NO | NOTES |
|---|------------|-----------|--------------|
| Have You changes Your residence from 03-11-2021 to 31-12-2021 without communicate the transfer to Your employer? In case of positive answer to the above question, You must fulfill the 730 tax form. | | | |
| Do You have any dependent? Haven't You jet communicated it to your employer? (Example: a child born in 2021) In case of positive answer, it is not compulsory to submit the 730 tax form but it could be useful. | | | |

| INCOME received in 2021 | YES | NO | NOTES |
|---|------------|-----------|--------------|
| As an employee, have you received any earnings from more than one employer and none of them have made the balance? In case of a positive answer, You must submit the 730 tax form. | | | |
| Have You received any earnings certificated by CU 2022, beyond Your income as employee, for example any income for occasional freelance jobs? In case of positive answer to the above question, You must fulfill the 730 tax form. | | | |
| Do You own in Italy any lands or real estates other than your primary residence? In case of a positive answer, you must submit the 730 tax form. | | | |
| Do you own in Italy any properties that You have put on rent? In case of a positive answer, You must submit the 730 tax form. | | | |
| Have You received any dividend from companies in which you are a partner? In case of a positive answer, you must submit the 730 tax form. | | | |

| EXPENSES AND BURDENS OCCURRED in 2021: The compilation of 730 form is not compulsory but could be useful if one of the following situations occur. | YES | NO | NOTES |
|--|------------|-----------|--------------|
| Have You incurred any medical expenses for yourself or for your dependents for an amount greater than € 129 in the year 2020? (Examples: dentist, medical care exams, etc. ..) | | | |
| Have you signed a loan for the purchase of your principal residence? | | | |
| Do You have any life insurance policies for death risk or permanent disabilities above 5%, deriving from any type of reason (not 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 dependent members of your family? | | | |
| Have You incurred any expenses for donations to Onlus or NOG (Non Governmental Organizations) ? | | | |
| CAF INTERREGIONALE DIPENDENTI SRL | | | Pagina 4 |

| | | | |
|--|--|--|--|
| Have You incurred any expenses for your children's kindergarten enrollment (maximum age of the child: 3 years old)? | | | |
| Have You autonomously deposit any amount of money to provident institutions 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 expenses with reference to restructuring or restoration of the external facade of your own real estates? | | | |
| Have you incurred any rent expenses for the dwelling in which you reside? | | | |

2) VERIFICATION FOR 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 2021 and the highest amount owned in 2021 on the above mentioned bank account. | | | |
| Do You have any properties on lease abroad? | | | |
| Do You own abroad, 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 and soon? | | | |
| Do You own abroad any luxury goods such as yachts, precious jewels, artworks, luxury cars, or precious metals? | | | |

DATE ____ / ____ / 2022

SIGNATURE
