**STATEMENT OF ASSETS FOR THE APPROVAL OF THE RIGHT OF OCCUPANCY**

Every person **moving to a right-of-occupancy home** between the ages of 18 and 54 must provide an account of their assets. “Assets” means, among other things, shares in limited liability housing companies, real estate, funds, securities, and savings in bank accounts. When determining a person’s assets, any debts applying to the assets are considered, such as outstanding mortgage loans and consumer credit. The overall amount of assets is taken as the net asset value, i.e., assets – debts = overall assets.

The assets are shown on the **pre-completed tax return** sent by the Tax Administration. Up-to-date accounts of assets and the debts applying to them must always be provided, showing the fair value of the assets. The assets transferred through sale or donation in the year preceding the application are also taken into account.

Fill in the form carefully to ensure your right of occupancy is approved. **By signing the form, you affirm that the information you have provided is correct.** A right-of-occupancy agreement can only be made when all the necessary documentation has been submitted.

**Share in a limited liability housing company or real estate**

- A copy of the deed of sale if the apartment or real estate was purchased in the preceding 12 months; or

- The estate agent’s estimate, sale assignment agreement or purchase offer if the apartment or real estate has not yet been sold; additionally, a building manager’s certificate if the basic details of the property (location, apartment type and floor area) are not stated in the document; or- A copy of the deed of sale if the apartment and real estate has already been sold

**Summer house**

- A copy of the deed of sale if the summer house was purchased or sold in the preceding 12 months; or

- A property tax decision (four pages) and the applicant’s own account of the value of the real estate

**Investments: shares and funds**

- A printout from an online bank or a bank statement showing the value of the investments; the printout must also show the sale price of the shares or funds and the owner’s name

**Other assets**

- A separate statement must be provided on joint ownership (such as a share of a death estate) and consortium holdings, showing the owners’ names and amount of holdings- An account of other assets unless their value is negligible

**Account of debts**

- A printout from an online bank or another statement by a creditor showing debts and consumer credit; the printout must show the debtor’s name; or

- Receipts or a bank’s statement of repaid debt in conjunction with the sale of shares in a limited liability housing company or real estate

- A receipt for a real estate agency commission

**Other accounts**

- If necessary, a certificate of pending divorce proceedings

- Prenuptial agreement or agreement on the division of assets

- For separation in a non-marital partnership, a statement on the division of assets and debts

**STATEMENT OF ASSETS FOR THE APPROVAL OF THE RIGHT OF OCCUPANCY**

**DETAILS ON THE RIGHT-OF-OCCUPANCY COMPANY AND SITE**

Name of the right-of-occupancy company

Name and address of the site

Number of rooms in the apartment

Number of rooms in the apartment

**APPLICANT’S DETAILS**

**CO-APPLICANT’S DETAILS**

(person to be included in the agreement)

Personal ID code

Order number

Personal ID code

Last name

Last name

First names

First names

**NUMBER OF CHILDREN**

Number of children aged under 18 who will live in the home

**OTHER INDIVIDUALS AGED 18–54 WHO WILL LIVE IN THE HOME**

Personal ID code

Last name

First names

**YOU DO NOT NEED TO COMPLETE A STATEMENT OF ASSETS IF**

the applicant(s) or another person who will live in the home is at least 55 years old

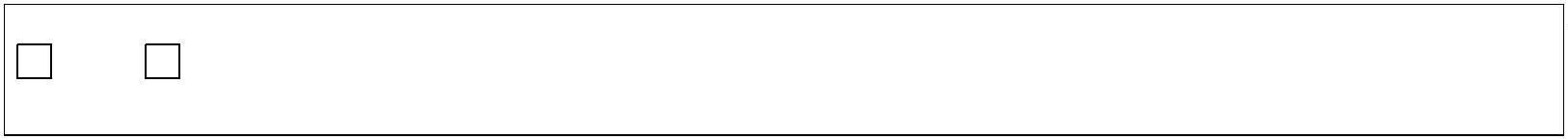
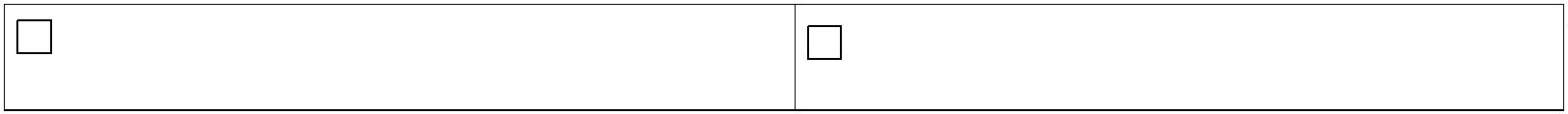
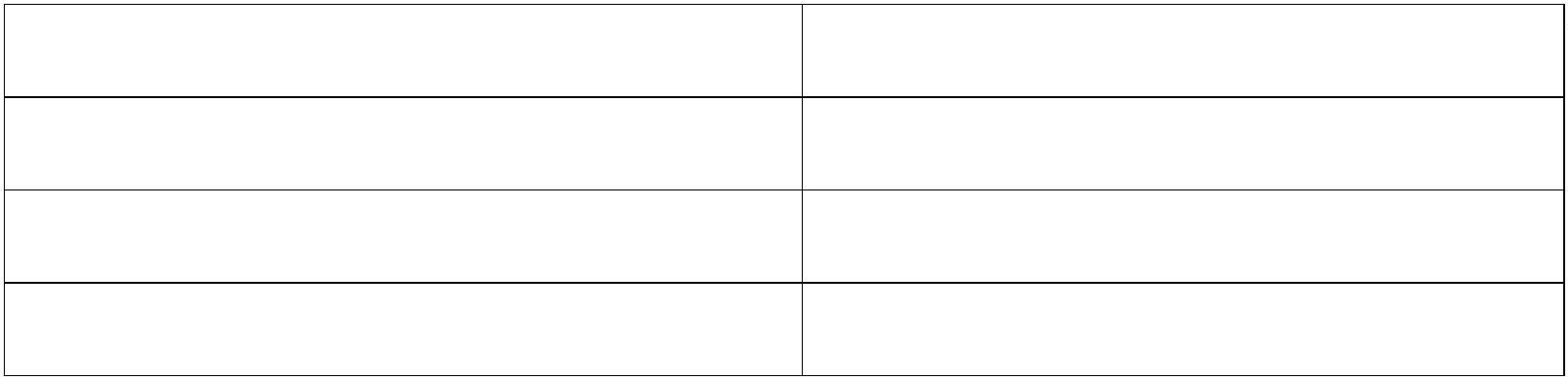
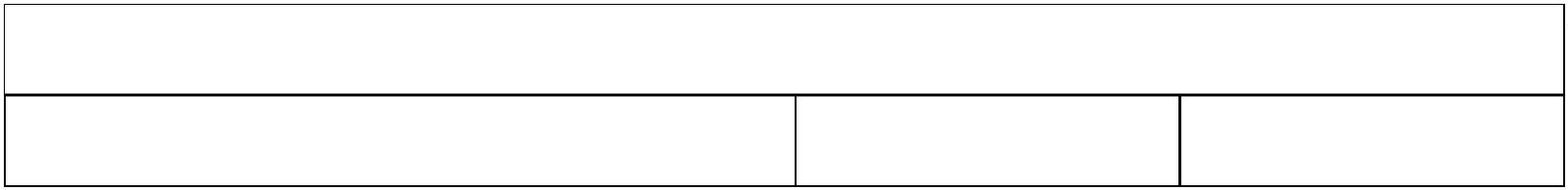
the applicant(s) is moving from one right-of-occupancy home to another

**THE APPLICANT(S) OR ANOTHER PERSON WHO WILL LIVE IN THE HOME CURRENTLY HAVE A RIGHT-OF-OCCUPANCY HOME OR A SHARE IN A RIGHT-OF-OCCUPANCY HOME**

Name of the right-of-occupancy company and address of the home

No

Yes,



**INFORMATION ABOUT HOME OWNERSHIP AND OTHER REAL ESTATE**

Address of the owned home

Number of rooms

Floor area

Estimate of the fair price of the home (€)

(e.g., an estate agent’s estimate, assignment agreement or sale price of a similar home).

If the apartment is sold, attach a copy of the deed of sale and a separate appendix on the repaid loans.

Loans attached to an owned home, *separate attachment*

Address of other real estate or detached house

Estimate of the fair price of the other real estate or detached house or share thereof, *separate attachment*

Date of sale of the other real estate or detached house. Copy of the deed of sale for the sold property and *separate appendix* on repaid loans.

Number of rooms

Floor area

Purpose of use of the building

Year-round use

Summer house

Other. Please specify:

**OTHER ASSETS**

The applicant(s)/people who will live in the home have other assets and/or loans, *separate attachment*

Assets, bank deposits, share

in a death estate or consortium, loan

Value, loan or bank account

balance

A *separate account* of joint ownership (e.g., shares in a death estate) must be given, showing the names and holdings of the owners.

A copy of the most recent pre-completed tax return must be appended to the application.

The tax return is available in MyTax at -> Letterbox -> Pre-completed tax return (PDF)

**I/we affirm that I/we have no other assets than those I/we have declared.**

**Signatures of the applicants to be included in the right-of-occupancy agreement.**

Locality and date

Signature of the applicant

Signature of the co-applicant to be included in the agreement

Address (street address, postcode and post town)

Phone number and email address

Number of rooms

Area of the real estate

Share (%)

