

Checklist

We need the following for setting up new members:

- An ID document due to legal requirements (personal ID or passport)
- Your tax number (if available) and your tax identification number
- The previous year's tax notice, if available
- Valid bank details

We need the following documents for the consultation and for drawing up your income tax return:

Documentation of income:

- Your electronic wage tax certificate(s)
- In case of severance payments, also the wage or salary settlements of the month in which the payment was made, as well as the notice of termination or the cancellation agreement
- Evidence of the progression income, such as unemployment benefits, maternity and parental benefits, sickness and transfer benefits, insolvency benefits
- Tax certifications for capital yield (e.g. interests, profits from sale of shares, etc.)
- Rent contracts, payment evidence in case of rent income,
- Notifications of pension payments

Children:

- Evidence of child day-care costs (e.g. account statements, contracts, bills)
- Child benefit notices and child benefit revocation notices
- School and/or training contracts, matriculation certificates
- Children's own income
- Evidence of tuition paid

Special expenses:

- Third-party liability, accident, disability and invalidity, life and pension insurances
- Evidence of Riester and Rürup pensions (private old-age pension insurance)
- Donations, benefits, membership fees
- Expenses for vocational training

Extraordinary expenses:

- Health expenses (e.g. visual aids, dentures, alternative practitioners, supplementary payment for prescriptions, etc.)
- Burial costs
- Evidence of degree of disability, evidence of nursing care levels (Pflegestufe/Pflegegrad)
- Evidence of support for family members in need of assistance

Professional expenses for income from employed work:

- Mileage documentation (e.g. service booklet, workshop bill, etc.)
- Work equipment and work clothing
- Contributions to professional associations and labour unions
- Expenses for work room
- Expenses for business trips
- Professional further and additional training
- Costs for two households
- Application costs
- Tax consultancy costs, contributions of wage-tax assistance associations

Professional expenses for rent and lease income:

- Money procurement costs and interests on loans
- Expenses for preservation
- Land tax, building insurances, chimney sweep, settlement at usage values/municipal expenses, heating costs
- Ancillary cost settlements with tenant(s)
- Administrator's costs

Further documents that may lead to tax relief:

- Craftspeople's invoices and services related to the household (invoices with separate indication of the services rendered and documentation of payments)
- Secondary cost settlements of the building administration/landlord
- Applications for housing subsidy