



CHECKLIST | TAX DECLARATION

General information

- ID card or passport - must be presented and copied for identification purposes at the initial consultation due to a legal obligation.
- Tax number, tax identification number
- Income tax assessment from the previous year / Advance payment assessment
- Bank statements from the year concerned, if applicable

Income

- Employment tax statement, Registered Retirement Savings Plan
- Proof of
 - Unemployment, parental or short-time working allowances
 - sickness allowance, maternity allowance
- For pensioners (such as retirement, invalidity, widow, company and private pensions)
 - for the first receipt of pension: the notice of one's pension allowance
 - annual pension certificate
- Capital income (tax assessment, income statement)
- Investment funds (tax certificate, income statement for foreign custody accounts, advance flat rate)
- Foreign and other income (such as from pensions, leasing, investment income, crypto currency)

Rental income

- Rent, other expenses (such as rental contract, statement of other expenses from property management)
- Purchase contract, notary costs, agent fee, land transfer tax
- Construction and repair bills
- Interest on loans, interest portion of non-interest-bearing receivables
- Property tax, water, sewage, electricity, garbage collection fees, operating costs of the heating system - such as maintenance, fuel, list of additional costs (from homeowner association)
- Incidental cost statement with the tenant

Professional expenses

- Trips from home - to workplace
 - distance in kilometres, number of trips, Job ticket
 - collective transport (such as plant bus)
 - with high mileage (such as TÜV report, ASU, inspection invoices with mileage)
- Car accident costs
- Company car (logbook, additional payments such as fuel as required)
- Union fees
- Work equipment (such as computers, tools, work clothes, literature)
- Study and/or home office flat rate, telephone-, internet costs
- Training costs (such as study costs, technician, expert courses minus directly assigned subsidies, such as Bafög)
- Application fees (such as travel expenses, office supplies)
- Relocation costs due to work-based move minus taxfree compensation
- Accident and occupational legal protection insurance
- Tax consulting fees (such as membership fee, tax declaration assistance society)
- Winter employment allocation



- External activities (such as travel-, accommodation costs, additional expenses for meals minus tax-free replacement, provision of meals)
- Second home (such as rent, utility costs, necessary household items, second home tax minus tax-free compensation)

Energy-based renovation

- Expenses for energy-based renovation of own home (older than 10 years) (such as thermal insulation, heating system, windows and doors)
- Certificate from specialist company/energy consultant
- Public subsidies/reconstruction loan corporation loan
No funding

Housing-related services

- Craftsmen's bills (only wages)
- Ancillary costs (such as chimney sweep, caretaker)
- Costs for help in own household
- Public subsidies/reconstruction loan corporation loan
No funding

Special expenses

- Riester-, Rürup retirement plan (grant-aided pension plans)
- Payment to German or foreign statutory pension funds
- Insurance contributions (such as private health-, care-, life-, liability-, vehicle insurance)
- Donation certificates
- Church tax refund/arrears payment

Extraordinary costs

- Proof of disability (such as disability card, certificate from the social security office, pension certificate for accident pension)
- Expenditure for nursing and care services (in household) minus subsidy (such as attendance allowance/sick pay/non-cash allowance etc.)
- Medical expenses (such as drugs, dental, glasses, hospitalisation, spa/medical practitioner)
- Travel expenses to doctors (quantity and km)
- Funeral expenses, existential legal proceedings
- Maintenance payments for children, ex-husband/ex-wife, parents, grandparents, life partner
- Health and nursing insurance contributions (KV/PV contributions) for dependent persons
- Home costs, costs for domestic help

Children

- Up to 14 years: Childcare costs (such as fees for crèches, babysitters, nannies)
- Up to 18 years: Training and apprenticeship contracts, matriculation certificate
- Training allowance with external accommodation
- School fees (such as private school, geriatric nursing college)
- Employment tax statement, KV/PV contributions
- Proof for single parents
- Tax Identification number (if available)