



TAX CHECKLIST

Which documents are necessary for the preparation of your tax return?

FOR INITIAL CONSULTATION AND NEW MANDATES

- ☐ Tax assessment and tax return of the previous year
- ☐ Copy of your passport or ID card (concerning spouses for both)

INCOME FROM CURRENT AND PAST EMPLOYMENT

- ☐ Annual wage pay slip, capital-forming benefits

Certificate of

- ☐ Unemployment benefit, parental allowance, short time working allowance
- ☐ Sickness benefit, maternity allowance

In the case of pension (e.g. disability, widow's, company, and private pensions)

- ☐ Pension notice (on first withdrawal)
- ☐ Annual pension certificate

INCOME FROM CAPITAL

- ☐ Capital income (tax certificate, income statement)
- ☐ Investment funds (tax certificate)
- ☐ Foreign and other income (e.g. pensions, rental, capital income, cryptocurrency)

FOREIGN INCOME

- ☐ Information on the type of income (rental, capital income, etc.)
- ☐ Proof of taxation of income abroad
- ☐ Foreign tax return / tax assessments

RENTAL INCOME

- ☐ Rent, utility costs (e.g. rental agreement, utility bill property management)
- ☐ Purchase contract, notary fees, brokerage fee, real estate transfer tax
- ☐ Construction and repair invoices
- ☐ Interest certificates for loans

TAX DEDUCTIBLE EXPENSES

Trips Apartment - Workplace

- ☐ Distance km, number of trips, job ticket
- ☐ Company car (if applicable logbook, additional payments e.g. fuel)
- ☐ Trade union dues
- ☐ Work equipment (e.g., computer, tools, work clothes, specialist literature)
- ☐ Study or home office flat rate, telephone, internet costs
- ☐ Training costs (e.g. study costs, technician's, master class minus directly assignable subsidies e.g. Bafög)
- ☐ Application costs (e.g., travel expenses, office supplies)
- ☐ Relocation costs professionally arranged less tax-free replacement

OTHER ADVERTISING COSTS

- ☐ Accident and professional legal expenses insurance
- ☐ Tax consulting costs
- ☐ Out-of-home activities (e.g. travel, accommodation costs, additional food expenses less tax replacement, provision of meals)
- ☐ Double housekeeping (e.g. rent, ancillary rental costs, necessary household contents, second home tax less tax, Replacement)

HOUSEHOLD SERVICES

- ☐ Craftsman invoices (wages only)
- ☐ Utility bill (e.g. chimney sweeper, caretaker)
- ☐ Expenses for domestic help, care and support services in the household

EXTRA EXPENSES

- ☐ Riester pension, Rürup pension
- ☐ Payment into domestic or foreign statutory pension funds
- ☐ Insurance contributions (e.g. private health, care, life, liability, car insurance)
- ☐ Donation receipts
- ☐ Church tax refund/additional payment

EXCEPTIONAL EXPENSES

- ☐ Proof of disability (e.g. disability card, certificate from the pension office, pension notice about accident pension)
- ☐ Medical expenses (e.g. medicines, dentist, glasses, hospitalization, cure, alternative practitioner)
- ☐ Travel costs to doctors (number and km)
- ☐ Funeral costs, existential court proceedings
- ☐ Alimony payments for children, ex-husband-wife, parents, grandparents, partner
- ☐ Health and long-term care insurance contributions for maintained persons
- ☐ Home costs, costs for domestic help

CHILDREN

- ☐ Up to 14 years: Childcare costs (e.g. fees for kindergarten, after-school care, babysitter, childminder)
- ☐ Over 18 years: training and apprenticeship contracts, certificate of enrolment
- ☐ Training allowance for external accommodation
- ☐ School fees (e.g. private, geriatric care schools, aso.)
- ☐ Income tax certificate, Health Insurance and Care Insurance contributions
- ☐ Proof for single parents
- ☐ Tax identification number (if available)

Do you have any questions about the tax documents?
Our consultants will be happy to help you!

www.german-incometax.de

