

Checklist with details:

Check list for income tax return

The following list is meant to provide you with an overview about the most important documents. If you have additional documents that may be helpful, please do not hesitate to send them to us, as well.

In order to achieve the best possible tax savings, please arrange an individual appointment with us.

1. Income from

- business establishment
- self-employed work
- annual financial statement if already created by a third party

2. Income from a salaried occupation

employees/civil servants/pensioners

- income tax card
- proofs for times in which you have not been working:
 - unemployment compensation
 - sickness benefit
 - maternity benefit
- documents of capital formation savings payment
- receipts und documents about:
 - job-related relocation
 - maintenance of two households (rent, additional property expenses, necessary household effects)
 - business trips
 - commuting expenses
 - professional clothing
 - work equipment (computer, tools)
 - technical literature
 - training costs

3. Income from investment of capital

- certificate about interest income tax provided by your bank(s)
- declaration of profits
- certificates of profit distribution
- certificate § 24 c EStG (German income tax law)

4. Income from renting property

- purchase contract
- construction invoices
- loan contracts and interest statements
- rental agreements
- records of income-related expenses
- water, electricity, real estate tax, property management, residence insurance, etc.

5. Additional income

- private sales
- sales of stocks or land
- pension approval certificate /pension adjustment notification

6. Special expenses

insurance premiums, among others:

- health insurance
- nursing insurance
- life insurance
- accident insurance
- liability insurance

- costs for tax advice
- donations
- training costs for a future job
- support payments for relatives

7. Extraordinary financial burden

- costs of illness, treatment, hospital
- costs of drugs and additional payments
- costs of treatment at a health resort and for alternative practitioners
- cost of household aid for domestic help
- costs of glasses
- dentist costs
- costs of a divorce
- funeral costs
- proof of disablement (handicapped ID, statement of the pension office, accident benefit approval certificate)
- in case of care for relatives: their proof of need (helplessness/nursing level 3)
- support for relatives in need

8. Additional documents

- tax assessment of the previous year/carry-forward from the previous year
- if there is no tax assessment of the previous year, please provide your tax number
- if marital status has changed: birth certificate, marriage certificate, death certificate
- child benefits
- bank details
- application for subsidy for the promotion of house building