



## **Checklist**

### **Documents needed for your income tax return**

The following checklist shows the necessary documents for the preparation of your income tax return.

Please be aware to bring the documents that apply to you to your consultation appointment or e-mail the documents to [mgriebenow@lohnsteuerhilfe-ludwigsburg.de](mailto:mgriebenow@lohnsteuerhilfe-ludwigsburg.de)

#### **General Documents**

- Latest income tax assessment
- Date of your Marriage
- Annual certificate of received unemployment allowances, sick allowances, parental allowances, temporary allowances, maternity allowances, insolvency allowances
- Statement of operating costs / billing of incidentals
- Invoices of domestic services or/and maintenances

#### **Special Expenses**

- Evidences of private medical / care insurance contributions
- Proof of accident-, private liability-, vehicle liability-, disability-, pension- and life insurances (these evidences are only necessary if the amount paid for your medical- and care insurances are less than 1.900 € p.a. / for married people less than 3.800 € p.a.)
- „Riester“ agreement: Certificate according to § 92 EStG
- Contributions for „Rürup“ pension
- Donation receipt(s)

#### **Extraordinary Expenses**

- Proof of alimony expenses
- Certificate(s) of disease and nursing expenses
- Disability certificate

#### **Children(s)**

- Tax Identification number
- Childcare expenses
- Evidence(s) of school fees
- Health insurance and care insurance contributions

#### **Employee**

- Income tax certificate

Several evidences for example:

- Application costs
- Overview of Business trips (number of trips, duration of the trips, addresses, distance in kilometers)
- Information about the distance between your living and your working place (period of employment, working address, one-way distance in kilometers)
- Working equipment (for example Laptop, literature, printer, special working clothes)
- Education costs (for example training expenses, travel expenses)
- Contributions paid for trade associations or unions
- Tax consultancy fees
- Legal protection insurance
- Home offices expenses for example for teachers or judicial officers (rental agreement, electricity expenses, waste disposal charge, calculation of living space)
- Relocation cost (only if there is a time saving of minimum 30 minutes to your working place)
- Other professional expenses



**Rental Income**

- Documents in connection with the rented property (for example the sales contract and incidental acquisition costs (only for new acquisitions), evidence(s) of debt interests, rental contract, property management accounting or billing of incidentals)
- Property tax assessment, maintenance expenses, acquisitions of movable assets, number of trips to the rental object
- If the property was sold and between the purchase and the selling of the object were less than 10 years: contract of the purchase and the selling, incidental sales costs

**Retirement**

- Certificate of pension or widow's pension (can be inquired by phone from the German pension insurance)
- Notification of benefits for private disability pension, etc.
- Evidence of pensions from retirement provision contracts

**Investment Income**

- Tax certificate from domestic and foreign investment income (for example interests and dividends, option premiums, income as a silent partner)
- Evidences of other investment income

**Notice:**

Individual particularities are clarified during the consultation.

Yours

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