ISAR E.V.
LOHNSTEUERHILFEVEREIN

Checklist for your tax declaration

Necessary documents of the tax consultation:

☐ **Capital-forming investments** — proof of company savings scheme contributions

☐ **Certificate EU/EWR** — if spouse is resident in another European country

☐ **Certificate of wage tax deduction** — electronic certificate from employer (Tax class I-VI), Income from foreign countries

☐ **Children**
- tax-ID number, child benefit, confirmation of end of child benefits
- over age of 18: apprenticeship contract, confirmation of civilian or military service, proof of unemployment, university enrolment
- under age of 1: birth certificate   - foreign countries: certificate of marital status
- up to age of 14: childcare costs (invoice without fees for eating and playing)

☐ **Identification** — tax-ID number, identity card or passport for each taxed person (esp. married couple)

☐ **Income tax assessment** — for new members: income tax assessment and if so church tax certificate (from last year)

☐ **Investment income (also from foreign countries)** — bank certificate, building society, stocks and shares, tax liability assesments, declaration of profits from interest received and other capital gains

☐ **Pension**
- state pension entitlement and notifications according §22 Nr. 5 EstG
- proof of: invalidity pension, widow's pension, retirement pension, private pension insurance

☐ **Property sale/Amortization** — records relating gain and expenses, annual bank statements

☐ **Rent and lease** — income, expenses, rental contract, housing subsidy, standard ground value, purchase prise division (ground and building)

☐ **Retirement provision** — private pension scheme and annuity contracts, certificates (Riester and/or Rürüp), social insurance number

☐ **Settlements** — settlement agreement, contract dissolution agreement, proof of payment

☐ **Wage compensation** — confirmation letters about f. e. unemployment benefit, parental leave pay, sick pay, insolvency compensation, maternity pay, interim payments

Please review if you also have following documents:

☐ **Additional meal allowance** — bus driver, official journey, operational alternating occupation

☐ **Apprenticeship** — if not the regular occupation

☐ **Car accident** — self-inflicted, job-related ride, police or insurance, invoices, report

☐ **Costs of further education** — for example: technician, master, language and computer courses, truck driving license, studies

☐ **Disability** — proof of disability: disability card, certificate from the pension office, nursing degree

☐ **Donations** — Caritas, Red Cross, political parties, ASB, etc.

☐ **Double householding** — lease secondary residence, travel expenses, telephone costs, acquirements for householding

☐ **Driving from home to workplace**
- public transport, taxi, own car (TÜV Report, always keep inspection invoices)
- work contract for determining workplace

☐ **Funeral** — funeral expenses

☐ **Healthcare costs** — doctor visits, pharmacy costs, alternative praticioner, optician

☐ **Insurances** — life, liability, car and accident insurance, legal

☐ **Job application expenses** — copying, postage and travel expenses, professional CV writing services, advertising fees

☐ **Maintenance payments**
- wife, children, parents, grandparents: proof of income
- tax-ID number if german citizen

☐ **Moving expenses** — employment changed, company housing, time saving at least 1h everyday

☐ **Private phone** — duty on call, appointment making

☐ **School fees** — private school and european school, which were awarded as state recognition for alternate school

☐ **Tax consulting fees** — membership fees, invoices (tax consultant)

☐ **Professional associations** — for example: IGM or Verdi

☐ **Tradesman and household services**
- property maintenance costs, reconstruction (proof of payment required)
- invoices for gardening, cleaning, moving costs, small domestic repairs, caretaker (proof of pay required)
- home help / nursing services (invoice and proof of salary payment required)
- service charge statements (rented appartement), statement of housing subsidy (condominium)

☐ **Work equipment**
- job-related: computer, briefcase, tools, office suplies, specialist literature, calculator
- workwear, cleaning of workwear

☐ **Workroom / Home-Office** — rent fee, running costs, confirmation of the employer, draft of appartement

Please bring along all the documents and receipts to the consultation you consider relevant to your tax return. If you have data transfer records relating the reported insurances, wage compensations etc., please bring this necessarily with you to the appointment.