

# Checklist for your tax declaration

This checklist contains the most important documents/information that are often required in order to prepare German income tax return and identify potential tax savings.

Please provide us with documentation regarding your complete German and non-German income and all related expenses. Non-German income will often be tax free in Germany but will be considered when calculating your applicable income tax rate (Progressionsvorbehalt).

We kindly ask you to fill in this checklist and send it to us by post or e-mail with the relevant documents.

## General information

Family Name	<input type="text"/>
First Name	<input type="text"/>
Date of Birth	<input type="text"/>
Place of Birth	<input type="text"/>
Religion	<input type="text"/>
Address	<input type="text"/>
Telephone number	<input type="text"/>
Tax number	<input type="text"/>
Tax ID number	<input type="text"/>
Current bank accounts details:	
IBAN	<input type="text"/>
BIC	<input type="text"/>

## Income as an employee

	YES	NO
Wage tax certificate provided by your employer (Lohnsteuerbescheinigung)	<input type="checkbox"/>	<input type="checkbox"/>
Relocation expenses (estate agent, flights, transport, double rent, list of reimbursements by employer)	<input type="checkbox"/>	<input type="checkbox"/>
Public transportation tickets for work related travel	<input type="checkbox"/>	<input type="checkbox"/>
Documentation for office at home	<input type="checkbox"/>	<input type="checkbox"/>
Work related equipment and office supplies	<input type="checkbox"/>	<input type="checkbox"/>
Payments to trade union (Gewerkschaften), professional chamber	<input type="checkbox"/>	<input type="checkbox"/>
Expenses for business trips (travel, hotel; not reimbursed by employer)	<input type="checkbox"/>	<input type="checkbox"/>
Education and training costs (e.g. MBA, language course)	<input type="checkbox"/>	<input type="checkbox"/>
Tax advice costs	<input type="checkbox"/>	<input type="checkbox"/>

## Rental and lease income

	YES	NO
Documentation for property in Germany and abroad	<input type="checkbox"/>	<input type="checkbox"/>
Rental/leasing contracts	<input type="checkbox"/>	<input type="checkbox"/>
Acquisition date and acquisition cost (purchase agreement, invoices, real estate transfer tax, notary)	<input type="checkbox"/>	<input type="checkbox"/>
Documentation regarding ongoing costs (including repair, renovation, property managers accounting, brokerage fees, property tax, travel expenses)	<input type="checkbox"/>	<input type="checkbox"/>
Financing documentation, documentation of interest payments	<input type="checkbox"/>	<input type="checkbox"/>
Documents regarding annual depreciation	<input type="checkbox"/>	<input type="checkbox"/>

## Capital and interest income

	YES	NO
Annual tax certificates for capital and interest income (Jahressteuerbescheinigung)	<input type="checkbox"/>	<input type="checkbox"/>
Documents relating to investments and capital income abroad	<input type="checkbox"/>	<input type="checkbox"/>
Previously untaxed private investments income (Personal loans, dividends)	<input type="checkbox"/>	<input type="checkbox"/>

### Income from business / self-employment

	YES	NO
Accounting records	<input type="checkbox"/>	<input type="checkbox"/>
Documentation/invoices of operating income and operating expenses	<input type="checkbox"/>	<input type="checkbox"/>
Cash journal	<input type="checkbox"/>	<input type="checkbox"/>
Documentation for business related payments on private bank account	<input type="checkbox"/>	<input type="checkbox"/>
Car expenses (receipts, log book)	<input type="checkbox"/>	<input type="checkbox"/>
Previous year business tax returns and assessments (VAT/trade tax)	<input type="checkbox"/>	<input type="checkbox"/>

### Other income

	YES	NO
Certificate of unemployment benefits (Arbeitslosengeld), parental benefits (Elterngeld), sick pay (Krankengeld), maternity pay (Mutterschaftsgeld)	<input type="checkbox"/>	<input type="checkbox"/>
Certificates and information on pension schemes	<input type="checkbox"/>	<input type="checkbox"/>
Sales of private property (real estate, movable assets)	<input type="checkbox"/>	<input type="checkbox"/>
Other extraordinary income	<input type="checkbox"/>	<input type="checkbox"/>

### Addition expenses

	YES	NO
Pension Plans/Pension Funds – certificates of the provider	<input type="checkbox"/>	<input type="checkbox"/>
Certificate for payments to private health insurance and nursing insurance	<input type="checkbox"/>	<input type="checkbox"/>
Other insurance contributions (e.g. life insurance, liability insurance, car insurance, accident insurance)	<input type="checkbox"/>	<input type="checkbox"/>
Charity/donation receipts	<input type="checkbox"/>	<input type="checkbox"/>

## Children

	YES	NO
Child support assessment (Kindergeldbescheid) or name and date of birth of children	<input type="checkbox"/>	<input type="checkbox"/>
Tax ID number	<input type="checkbox"/>	<input type="checkbox"/>
Schoolfees	<input type="checkbox"/>	<input type="checkbox"/>
Children over 18 years: School attendance certificate or university enrolment certificate In case of accommodation away from home (period), address of the residence, rental agreement	<input type="checkbox"/>	<input type="checkbox"/>

## Exceptional costs

	YES	NO
Medical expenses (such as drugs, dental, glasses, hospital, cure, doctor) unless reimbursed by health insurance	<input type="checkbox"/>	<input type="checkbox"/>
Proof of disability	<input type="checkbox"/>	<input type="checkbox"/>
Alimony payments for children, wife, parents	<input type="checkbox"/>	<input type="checkbox"/>

## Services in private households

	YES	NO
Documentation regarding private household help (cleaning lady)	<input type="checkbox"/>	<input type="checkbox"/>
Invoices for work carried out inside and outside the house/apartment	<input type="checkbox"/>	<input type="checkbox"/>