



## Checklist for your tax declaration

### Personal details

- Tax assessment for the previous year
- Advance tax payments
- Tax IDnos
- Bank details (IBAN)
- Telephone number and e-mail-adress
- Date of marriage, divorce, permanent separation
- Death of spouse, death certificate if required
- Proof of disability if at least 20 %
- Monthly payslip (December)

### Income

- Income tax certificate, capital forming benefits certificate
- Unemployment, sickness, maternity, parents' or other additional replacement benefits
- Capital gains and investment funds (tax certificate)
- Foreign and other income
- For pensioners: (such as retirement, invalidity, widow, company and private pensions)
- Pension notification certificate
- Annual pension certificate (notification for the tax office)

### Expenditure for household-related services

- Craftmen's bills for services at home (only wages and travel expenses)
- Ancillary costs (such as caretaker, chimney sweep)
- Costs for help in own household

### Children

- Childcare costs and above 18 years: Training and apprenticeship contracts, matriculation certificate, student grant payment certificate
- Training allowance in case of accomodation away from home
- School fees (such als private school, geriatric nursing college)
- IDnos and date(s) of birth of child(ren)
- Proof for single parents
- Employment tax statement, contributions to medical and care insurance
- Record of family funds

### Professional expenses

- Trips from home – to workplace
- Distance in km, number of trips, local transport ticket
- 3,5 or 6 day week

- Travel expenses for stays away from home
- Days of holidays and sickness
- Quantity of homeoffice days
- Union fees, GUV/Fakulta
- Accident and occupational legal protection insurance, professional indemnity insurance
- Car accident costs incurred on journey to work
- Second home (such as rent, utility costs)
- Training costs (such as study costs, technician)
- Application fees (such as travel expenses, office supplies)
- Tax consulting fees
- Travel expenses for field service (km)
- Work equipment (such as computers, tools, work clothes, literature)
- Relocation costs due to work-based move
- Work-related litigation costs
- Costs for workwear, dry cleaning of workwear

### Special expenses

- Insurance contributions (such as private health/care/life/liability/vehicle insurance)
- Church tax refund/arrears payment
- Donation certificates (charitable, politcal parties)
- Political party membership fee
- Riester-, Rürup retirement plan
- Payment to German or foreign statutory pension funds
- Health insurance contributions (basic tariff, additional contributions, reimbursements, bonus payments)
- Regular support payments to divorced/separated spouse

### Extraordinary costs

- Medical expenses (such as medication, dental, glasses, hospitalisation, spa/medical practitioner)
- Travel expenses to doctors (quantity and km)
- Funeral expenses, existential legal proceedings
- Home costs, costs for domestic help
- Expenditure for nursing and care services
- Maintenance payments for children, ex-husband/ex-wife, (grand) parents, civil partner
- Health and nursing insurance contributions
- Replacement of household items in cases of force majeure