



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

General Documents

- passport copy
- Latest income tax assessment (last two years)
- 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 requires an individual examination
In any case is required: number of days in office and home-office
 - 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

In the year of new acquisitions

- sales contract
- incidental acquisition costs

every year:

- evidence(s) of debt interests
- valid rental contract
- property management accounting or billing of incidentals)
 - Property tax assessment
 - maintenance expenses
 - billing of additional costs to the tenant
 - 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 (e.g. real estate agent, early repayment penalty)
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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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