

Check-list for income tax return

Important:

- Latest notification from tax authorities
- ver.di ID or membership number
- ID numbers of children
- Bavaria only: Church tax notification(s) for last year or year of assessment

Lohnsteuerservice



Income:

- Electronic annual income tax statement
- Certificate for submission to the tax office about
 - Unemployment benefit
 - Short-time working benefit
 - Sick pay / Maternity pay
 - Child benefit

If in receipt of pension (e.g. old-age pension, reduced earning capacity pension, widow's pension, private pensions)

- Pension payment notification

Telephone 0800 1000 48088

- Certificate of investment in capital formation
- Investment in capital formation (e.g. building society savings contract)
- Proof of disability
- Investment income (according to certificate)

Special expenditure:

- State-subsidized Riester pension certificate
- State-subsidized Rürup pension certificate
- Insurance premiums (e.g. life, liability, motor vehicle, private nursing care, and accident insurance)
- Health insurance: (private and mandatory) Proof of basic rate, additional contributions, premium refunds, bonus payments
- Donation receipts (e.g. Red Cross, Malteser International, Caritas, political parties, etc.)

Income-related expenses:

Union subscriptions (print out receipt yourself via internet platform "meine ver.di"), legal expenses and accident insurance, union support organization GUV/Fakulta

- Application costs
 - Travel home - workplace, number of days home office working
 - External activities - business travel
 - Work materials (e.g. computer, tools, work clothing, specialist literature)
 - Work room
 - Tax-related costs (e.g. tax advisor, income tax assistance association, tax software)
 - Double-budgeting
- (Rent, service charges, household effects)

Children

- Under age of 14: Childcare costs (e.g. fees for kindergarten, au pair, day nursery, babysitter, childminder)
- Over age of 18: Training and apprenticeship contracts, matriculation certificate, Bafög (student loan) certificate
- Electronic annual income tax statement

- Health insurance contributions

Extraordinary costs

- Medication, dentist, spectacles, hospitalization, spa, alternative practitioner
- List relevant journeys
- Funeral costs
 - Maintenance payments children / wife / parents / grandparents

Tradesmen's services:

- Tradesmen's invoices for modernization, renovation, repair (e.g. heating repair, chimney sweep, bathroom renovation, garden maintenance, washing machine)

Service charges

Annual statement of housing costs (rent, freehold, etc.)

Domestic services:

- Assistance in private home (e.g.: cleaning, cooking, ironing)
- Care, nursing and supervision of children, sick persons and other dependents

Miscellaneous:

**N.B. This list is not exhaustive.
If you wish to reduce your tax burden, there is nothing better than individual, face-to-face advice!**