

Dear Sir or Madam,

the following **checklist** serves as a quick overview of documents and information needed to complete your income tax return. It includes frequently occurring issues, and makes no claim to being complete. Please also consult your return of the previous year:

- **General information:**
 - ➔ Has your bank account/address changed?
 - ➔ copy of ID card (due to money laundering law)

- **Earned wages:**
 - ➔ end of year statement of total earnings (Lohnsteuerbescheinigung)
 - ➔ termination pay (contract)
 - ➔ taxfree compensation for capital accumulation purposes from your employer (vermögenswirksame Leistungen)
 - ➔ received unemployment benefits (Arbeitslosengeld)
 - ➔ received maternity pay (Mutterschaftsgeld)
 - ➔ received sick pay (Krankengeld)
 - ➔ costs of work related materials/equipment/appliances
 - ➔ commute to and from work (mileage)
 - ➔ application expenses
 - ➔ dual house hold and work related travel costs
 - ➔ education/training expenses
 - ➔ professional legal expenses
 - ➔ job-related relocation costs

- **Extraordinary expenses:**
 - ➔ health expenses & refunds (e.g. medical, apothecary)
 - ➔ optician / glasses
 - ➔ dental
 - ➔ costs for divorce
 - ➔ handicapped ID
 - ➔ household help / services close to home
 - ➔ handyman
 - ➔ dependent employment of household help

- **Children:**
 - ➔ received child allowance (Kindergeld)
 - ➔ costs related to education / apprenticeship
 - ➔ childrens income
 - ➔ costs of external housing
 - ➔ costs of supervision / care (Betreuungskosten)

- **Retirees:**
 - ➔ notice of granted / adjusted pensions

- **Special expenses:**
 - ➔ donations
 - ➔ alimony
 - ➔ Rürup-Renten (certificate / Bescheinigung)
 - ➔ Riester-Verträge (certificate / Bescheinigung)
 - ➔ certificate of private health insurance costs
 - ➔ disability / occupational disblement insurance contribution

- **Income from rent and lease:**
 - ➔ purchase contract (for new purchases)
 - ➔ loan contract (for new purchases)
 - ➔ statement of paid interest for the year
 - ➔ rental contracts and utilities statement
 - ➔ maintenance costs

- **Earned interest:**
 - ➔ interest statement (Steuerbescheinigungen)
 - ➔ declaration of profits (interest / dividends)
 - ➔ speculation gains and losses (sale of real estate or securities/shares)

- **Other benefits / subsidies:**
 - ➔ Elterngeld
 - ➔ benefits / subsidies granted for company foundings
 - ➔ KfW (e.g. Coachings)