

# TAX CHECKLIST

## INCOME:

- Employment tax statement
- Proof of
  - unemployment benefits / parental benefits / short-time work benefits
  - sick pay / maternity pay
- For pensioners (such as retirement, invalidity, widow and private insurance pensions)
  - for the first receipt of pension, the notice of one's pension allowance
  - annual pension certificate
- Registered Retirement Savings Plan (RRSP)

## RENTAL INCOME:

- Rent, utilities, housing benefit billing (rental contract, statement)
- Purchase contract, notary costs, agent fee, land transfer tax
- Construction and repair bills
- Interest certificate for loans
- Special depreciation for a monument, building renovation

## INCOME FROM CAPITAL ASSETS:

- Annual interest statement (such as building societies, banks, mutual funds, insurance)
- Tax certificates for withheld interest income tax
- Sale of shares / land etc.

## SPECIAL EXPENSES:

- Riester pension
- Rürup pension
- Payment into foreign state pension fund (such as England)
- Insurance contributions (such as private health, long-term care, life personal liability, car insurance)
- Donation certificates

## CHILDREN:

- Up to 14 years: Childcare costs, such as fees for crèches, babysitters, nannies
- Up to 18 years: Training and apprenticeship contracts, matriculation certificate
- Foreign address
- School fees (e.g. private schools, geriatric nursing care school, etc.)
- Employment tax statement, health insurance contributions
- Proof for single parents
- Identification number, if available

## FOR THE FIRST CONSULTATION:

- Tax assessment and tax return for the previous year
- Copy of official ID card (with spouses, for both partners)

## PROFESSIONAL EXPENSES:

- Union fees
- Accident and legal expenses insurance (occupational)
- Application fees (such as copying, postage and travel expenses, application folders)
- Trips from home to workplace, work away from home
  - distance in kilometres, number of trips
  - collective transport, such as plant bus
  - with high performance (TÜV report / ASU / inspection invoices with mileage)
  - car accident costs
- Travel expenses: Listing of travel expenses, meal allowances, accommodation costs (such as truck drivers, construction workers, field service)
- Company car (logbook, additional payments such as fuel as required)
- Work equipment (such as computers, tools, work clothes, literature)
- Second home (rent, utility costs, necessary household items, second home tax)
- Tax consulting fees (such as membership fee, tax declaration assistance society)
- Training costs (such as technician, expert courses minus directly assigned subsidies, such as Bafög)
- Study
- Relocation costs due to work-based move
- Winter employment allocation

## EXTRAORDINARY COSTS:

- Medical expenses (such as drugs, dental, glasses, hospitalisation, spa / medical practitioner...)
- Doctor trips (number and distance)
- Funeral expenses
- Costs for domestic help
- Proof of disability (disability card, certificate from the social security office, pension certificate for accident pension)
- Maintenance payments for children / spouses / parents / grandparents / significant other
- Health insurance contributions for dependent persons

## HOUSING-RELATED SERVICES:

- Craftsmen's bills (only wages)
- Ancillary costs (chimney sweep, caretaker)
- Costs for domestic help
- No support for public subsidies/KfW loans

## NOTES: