We complete your income tax return according to § 4 no. 11 of the German tax consulting law (StBerG).

## TAX-CHECKLIST

### INCOME
- Employment tax statement, Registered Retirement Savings Plan (RRSP)
- Proof of unemployement benefits / parental benefits / short-time work benefits
- Sick pay / maternity pay
- For pensioners (such as retirement, invalidity, widow, company and private pensions)
  - for the first receipt of pension, the notice of one’s pension allowance
  - annual pension certificate
- Capital income (tax assessment, income statement)
- Investment funds (tax certificate, income statement for foreign custody accounts, tax exemption for old shares, advance flat rate)
- Foreign income (e.g. pensions, rent, capital income)

### HOUSING-RELATED SERVICES
- Craftsmen’s bills (only wages)
- Ancillary costs (chimney sweep, caretaker)
- Costs for domestic help without maintenance
- No support for public subsidies/KfW loans

### 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

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

### CHILDREN
- Up to 14 years: Childcare costs, such as fees for crèches, babysitters, nannies
- Up to 18 years: Training and apprenticeship contracts, matriculation certificate
- Training allowance (external accommodation)
- School fees (e.g. private schools, geriatric nursing care school, etc.)
- Employment tax statement, health insurance contributions
- Proof for single parents
- Tax 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)

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

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