

Checklist

required Documents for tax returns

- End of the year certificate (Lohnsteuerbescheinigung), if applicable, from you and your spouse; both have to sign the tax return. Documents about your foreign income and the tax assessment of this country
- **Certificate of your employer about the number of days, you worked;** out of office for more than 8, 14 or 24 hours a day.
- **Private Pension (i.e. Riester and Rürup):**
 - certificate from the insurance company
 - social security number
- **Receipt for business expenses and confirmation about any reimbursement:**
 - work equipment (i.e. specialist books)
 - travelling expenses to your work
 - work clothes (i.e. lap coats, uniforms etc.)
 - union contribution
 - expenses for a second household due to your job (rent, lighting, additional costs and trips back home)
 - home office (rental agreement, layout plan)
 - contract of employment (if temporary)
 - tax service costs
- **Certificate of unemployment, benefits (Insolvenzgeld, Arbeitslosengeld I and II), sickness benefits as of six weeks from health insurance provider (Krankengeld), maternity allowance (Mutterschaftsgeld), parents benefits (Elterngeld).**
- **Receipt of further education, moving expenses due to your job**
- **Special expenses:**
 - contributions insurance
 - training costs
 - donation to a charity within EU
 - child-care fees (Kindergarten, Hort)
- **Extraordinary expenses (außergewöhnliche Belastungen):**
 - costs for divorce
 - costs for dentist, doctor including any reimbursements of health insurance or 3rd side
 - costs for funeral (in case of death in your family)
 - maintenance declaration with receipt of alimony payment
- **Certificate about your capital gains.**
- **Physical disability certificate (also for your children)**
- **Pension approval certificate for the last 2 years, if necessary also for your spouse.**
- **In case of income through rent:** rent income, costs of acquisition (a copy of the contract drawn up before a notary, Grunderwerbssteuerbescheid, Kosten für Auflassungsvormerkung sowie Eigentumserschreibung, Vermittlungsprovision), interest, real estate tax, utility costs for the last 2 years
- **Invoices of craftsmen, house hold services, medical care and billing for utilities, taxes, insurance, building maintenance.**
- **Receipts of all other earnings/losses - that you think may be necessary.**
- **last tax assessment (if applicable)**
- **identity card or passport**