

Checklist - Documents and information for income tax return

1	General information	<input type="checkbox"/> General information about you / wife /children <input type="checkbox"/> Tax authority, tax number, tax ID <input type="checkbox"/> bank data <input type="checkbox"/> last tax return and tax assessment <input type="checkbox"/> Where applicable correspondence with tax authorities
2	In case your civil status has changed within the year to be declared	<input type="checkbox"/> Marriage certificate <input type="checkbox"/> Divorce decree <input type="checkbox"/> Certificate of death <input type="checkbox"/> If living apart from your partner -date of separation
3	Children Children full of age	<input type="checkbox"/> Child allowance received <input type="checkbox"/> Expenses for childcare (kindergarten, day nanny etc.) <input type="checkbox"/> Information about father / mother of child if taxpayer / wife is not related to child (full name, address, date of birth) <input type="checkbox"/> Information about children not living with parents or living with a single parent <input type="checkbox"/> Confirmation of student status or article of apprenticeship <input type="checkbox"/> Rental agreement if child lives external due to school, study or apprenticeship <input type="checkbox"/> School- or study fees paid by parents
4	If not in job for the whole year	<input type="checkbox"/> Certificate of sickness benefits <input type="checkbox"/> Certificate of unemployment benefits <input type="checkbox"/> Other certificates / documents (maternity leave, year abroad, insolvency ...)
5	Special expenses / insurances / precaution	<input type="checkbox"/> Statements of contribution paid for health insurance, nursing insurance, annuity insurance, life insurance, liability insurance, accident insurance, disability insurance <input type="checkbox"/> Certificate of paid Riester Pension (§ 10a EStG) <input type="checkbox"/> Certificate of paid Rürup-Insurance <input type="checkbox"/> Certificates of donations

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6	Extraordinary expenses	<input type="checkbox"/> Expenses for medical care (not paid by insurance) <input type="checkbox"/> Handicapped ID <input type="checkbox"/> Certificate of nursing level <input type="checkbox"/> Proof of financial help for needy relatives and their own income <input type="checkbox"/> Expenses for divorce <input type="checkbox"/> Expenses for funeral
7	Services close to home	<input type="checkbox"/> Proof of services close to home (such as cleaning, gardening, nursery) by invoice or bank statement
8	Craftsmen's work	<input type="checkbox"/> Proof of craftsmen's work done in your home by invoice or bank statement (for example: repairs, service, renovation, modernisation)
9	Income from employment	<input type="checkbox"/> Wage certificate <input type="checkbox"/> Certificate of earnings replacement (maternity allowance, parents allowance) <input type="checkbox"/> Information about length of way to work and days worked within a week <input type="checkbox"/> Business trips <input type="checkbox"/> Certificate of reimbursements from employer for changing work location <input type="checkbox"/> Invoices for special workwear, work equipment, training, expenses for applications <input type="checkbox"/> Union contribution
10	Income from rent an lease	<input type="checkbox"/> Listing of the rent income <input type="checkbox"/> Information about object rented (location, date of acquisition, acquisition expenses, date of finalisation, if partly occupied by yourself information about the breakdown) <input type="checkbox"/> Paid interest for loan <input type="checkbox"/> Real estate tax <input type="checkbox"/> Yearly invoice for property management <input type="checkbox"/> Yearly invoice for water, gas, electricity <input type="checkbox"/> House insurance <input type="checkbox"/> Maintenance and repair, chimney sweeper

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11	Income from capital	<input type="checkbox"/> Certificate of withholding tax on capital gains
12	Other income	<input type="checkbox"/> Certificate of pension received <input type="checkbox"/> Information about income abroad <input type="checkbox"/> Further income