Checklist required Documents for tax returns



End of the year certificate (Lohnsteuerbescheinung), 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 acquisitation (a copy of the contract drawn up before a notary, Grunderwerbssteuerbescheid, Kosten für Auflassungsvormerkung sowie Eigentumsumschreibung, 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