



Checklist for the preparation of your tax declaration

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For the first consultation

- tax assessment of the previous year
- copy of official ID card (with spouses, for both)

disclosures taxpayer

last name	
first name	
address	
birthday	
occupation practiced	
family status	
religious affiliation	
bank details	
identification number	
tax number	

disclosures spouse

last name	
first name	
address (In case of deviation from the spouse)	
birthday	
occupation practiced	
religious affiliation	
identification number	

children

last name	
first name	
reporting address	
birthday	
religious affiliation	
identification number	

- up to 14 years: childcare (e.g. fees for kindergarden, Babysitter, nannies)
- over 18 years: Training and apprenticeship contracts, matriculation certificate, detailed information on military service/community service/voluntary social year
- Training allowance with external accommodation
- School fees (such as private school, geriatric nursing college)
- income tax certificate, KV/PV contributions
- Proof for single parents

income

- income tax certificate
- certificates about
 - Unemployment, parental or short-time working allowances
 - sickness allowance, maternity allowance
- 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)
- Foreign and other income (such as from pensions, leasing, investment income, crypto currency)

professional expenses

- Trips from home - to workplace
 - distance in kilometres, number of trips, Job ticket
 - Breakdown of working days (home office, out-of-town work, working days at first place of work)
 - Expenses for public transportsmittel
- Company car (logbook, additional payments such as fuel as required)
- Union dues
- Work equipment (such as computers, tools, work clothes, literature)
- study and/or home office flat rate, telephone-, internet
- Training costs (such as study costs)
- Application fees (such as travel expenses, office supplies)
- Relocation costs due to work-based move minus tax-free compensation
- Accident and occupational legal protection insurance
- Tax consulting fees
- Second home (e.g. rent, utility costs, necessary household items)
- Proof of motor vehicle accident costs if the accident is related to the generation of income, e.g. on business trips, for journeys between home and place of work

housing-related services

- Craftsmen's bills (only wages)
- Ancillary costs
- Costs for help in own household

Sonderausgaben

- Riester-, Rürup pension
- payment to German or foreign statutory pension funds
- Insurance contributions (such as private health-, care-, life-, liability-, vehicle insurance)
- Donation certificates
- Church tax refund/arrears payment
- Membership fees to political parties

extraordinary loads

- Proof of disability (such as disability card, certificate from the social security office, pension certificate for accident pension)
- Expenditure for nursing and care services (in house-hold) minus subsidy (such as attendance allowance/sick pay/non-cash allowance etc.)
- Medical expenses (e.g. medications, dentist fees, glasses, hospitalisation)
- Travel expenses to doctors (quantity and km)
- Funeral expenses, existential legal proceedings
- Maintenance payments for children, ex-husband/ex-wife, parents, grandparents, life partner
- Health and nursing insurance contributions (KV/PV contributions) for dependent persons
- retirement home costs, costs for domestic help

others

- Certificates of capital-forming benefits

concluding remark

This checklist is merely an aid without any claim to completeness. Therefore, please contact me if you have any doubts. I will be happy to answer your personal questions.