

## Documents and information for your income tax return 2016

### Personal information:

- health insurance, medical care, nursing insurance
- life and pension insurance, deductions for "Riester" and "Rürup" insurance policies
- accident insurance, liability insurance
- donations
- costs for professional training
- maintenance payments for close relatives
- medical costs not covered by insurance

### Employee

- income statement from employer, salary
- unemployment benefits, statement for medical insurance benefits
- transport costs / travelling costs (distance between home and working place)
- income-related expenses: tax consultant fees
- fees for professional associations
- equipment / accessories
- costs to job applications
- training costs, seminars, course fees
- relocation costs
- travelling expenses
- telephone costs
- double household costs
- costs for study (lay-out), if applicable

### Income from capital investments

- income statement, tax statement, interest
- from your bank accounts*
- dividends
- as a shareholder of GmbH, Ltd. ...*
- interest from life insurances

### **Income from rental**

- account statement for rent collected
- facility management bills
- copy of rental agreement
- rent paid by each tenant
- operating cost per tenant
- collected VAT
- shareholder dividends real estate agencies / funds
- income subletting
- loan interests
- property tax / waste disposal
- insurances
- maintenance costs
- legal costs
- chimney cleaner
- water, oil, gas
- cleaning costs
- travelling costs, telephone costs, mailing costs
- administration

### **Income from business**

- shareholder income

### **Pension / other income**

- pension statement
- pensions derived from life insurances
- other pension
- commissions
- sales
- property
- stock
- investmentfunds

### **Others**

- changes to personal data
- information on children
- housekeeping staff costs
- household maintenance costs
- operational maintenance costs, services, facility management costs
- certified degree of disability