

Income tax returns

Checklist of required documents and information

Personal information

- health insurance, medical care, nursing insurance
- life and pension insurance, deductions for „Riester“ and „Rürup“ insurance
- accident insurance, liability insurance
- donations
- cost 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 cost/ travelling costs (distance between home and working place)
- income-related expenses: tax consultant fees
- fees for professional associations
- equipment/ accessories
- costs of job applications
- training costs, seminars, course fee
- relocation costs
- travelling expenses
- telephone costs
- double household costs
- cost for study (lay-out) if applicable

Income from capital investments

- income statement, tax statement, interest (from all bank accounts)
- dividends (as shareholder of a GmbH, Ltd.,...)
- interest from life insurances

Income tax returns

Checklist of required documents and information

Income from rental

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

Income from business

- shareholder income

Pension/ other incomes

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

Other

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