

Check List

Please find below a list of the most important documents you should have with you when you visit your Steuerring advisor.

We will find out if there are any other documents we may need during our personal session; you can then hand these in later.

General Information

- > Identity card or passport - this is a legal requirement, it must be presented during the first appointment for identification purposes and will be copied.
- > Tax number, tax ID number
- > Last year's income tax liability assessment / demand for advance payments
- > Your bank statements for the respective years

Proof of Income

- > Electronic income tax statement(s)
- > Statements regarding the amount of paid
 - > Unemployment benefit
 - > Sickness benefit, maternity allowance, family allowance
 - > Transitional allowance
 - > Allowance in case of insolvency (from the Agentur für Arbeit (German Unemployment Agency))
- > settlements, settlement agreements / contract dissolution agreement
- > state pension entitlement / adjustment / receipt notifications
- > rental or leasing income, lease, proof of receipt
- > tax liability assessments and declaration of profits from interest received and other capital gains

Tax Deductible Expenses Incurred through Non-Self-Employed Work

- > Proof of commuting expenses, distances commuted
- > Contribution payments to professional associations (unions)
- > Invoices / receipts for tools and supplies needed for work
- > Invoices / receipts for workwear
- > Home office expenses
- > Travel expenses (confirmation from employer, reimbursements)
- > Vocational training and further education/qualification expenses (e.g. master craftsman or degree)
- > Job application expenses
- > Dual residence relief (lease secondary residence and proof of payment)
- > Tax consultancy expenses (e.g. contribution to mutual tax advisory societies)

Tax Deductible Expenses Incurred through Residential Property Letting

- > Mortgage interest
- > Maintenance and repair expenses
- > Council tax, water rates, charges for wastewater disposal and refuse collection, electricity bills, cost of operating the property's heating system (maintenance, fuel, pro rata list of incidental expenses (for shared ownership properties))
- > Reconciliation of incidental expenses recharged to tenant

Children

- > Child minding costs (contract, invoice, proof of payment)
- > Vocational training contract / certificate of university enrolment
- > Electronic income tax statement(s) of the child
- > Confirmation of end of child benefit receipt
- > School fees paid for tax deductible schools
- > Certificate of health and long-term care insurance contributions made for privately insured children

Special Expenses

- > Insurances (health and long-term care, incapacity and disability, accident and (vehicle third party) liability, life, annuities)
- > Statements regarding private pension schemes (Riester-Rente) (Riester pension) and regarding private life annuities (Rürup or basic pension)
- > Donations / gratuities
- > Own vocational training costs (certificate of participation, invoice for course fees)

Extraordinary Expenses

- > Documents related to healthcare costs such as receipts for medicines you have paid for, visits to a doctor you have paid for yourself, invoices for glasses, health insurance contribution statements, statements from the Beihilfestelle office, travel expenses
- > Funeral costs
- > Spa treatment costs (if certified by official medical officer before treatment starts)
- > Costs for alternative practitioner
- > Alimony/maintenance payments to relatives (proof of payment, proof of own receipts, proof of benefits claimed by the person supported and their assets)
- > Disability certificate
- > Proof of care level or degree

Other ‚Valuable‘ Documents

- > Property maintenance costs (e.g. chimney sweep, electrician, window fitter), invoice and proof of payment required
- > Certain household-related services (e.g. gardening, home help, nursing services), invoice and proof of payment required
- > Property management company's / landlord's pro rata reconciliation for your share of incidental expenses
- > Appendix VL to 2016
- > Application for residential new-builds subsidy

‚Proof of payment‘ always means either a confirmation of payment / receipt issued by your bank or a respective entry on your bank statement