

## Income Tax Checklist

Information and documents required to prepare your income tax return

Please submit the following documents

Copy of last tax return  
Income tax assessment of the last year  
Notification of loss deduction

Do you have any further questions ? Please do not hesitate to call us: +49 2565 93090

**Year:**

**Advisor:**

**Mdt.Nr.:**

### Personal Details

These details are only required if they have changed (then only fill in the changed fields) and **if we prepare your income tax return for the first time.**

	Taxpayer	Spouse
Last Name		
First Name		
Street		
Postcode, Place		
Communication Information		
Communication Information		
Date of Birth		
Exact religious affiliation if registered in Germany		
Family Status		
Family Status since		
<b>Tax Office Information</b>		
Tax Office		
Tax Number		
Identification Number		
<b>Bank Account</b>		
Bank Account Number		
Bank Routing Number		
Name of Bank		
IBAN		
BIC		

In case of foreign bank details please state the whole address of the bank (street, city, country) as well as SWIFT Code and IBAN (required)

## Income Tax Checklist

Information and documents required to prepare your income tax return

Information on Special Expenses			
<i>Please add the contribution invoice to the insurance.</i>			
Insurance	Taxpayer	Spouse	
Unemployment Insurance			
Medical Insurance <i>Evidence of the amounts transferred</i>			
Life Insurance/ Pension Scheme			
Care Insurance			
Accident Insurance			
Liability Insurance			
Riester-Agreement			
Riester-Agreement with certificate	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	
Maintenance Payments to divorced spouses/spouses living permanently separated			
Maintenance Payments	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	
Expenses for own professional education			
Professional Education	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	
Donations / Contributions			
<i>Please add the original certificate.</i>			
Donations / Contributions	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	
Membership fees	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	
Donations to political parties	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	
Information on Corona assistance			
<i>If you have received Corona aid (e.g., emergency aid, bridging aid), please submit evidence of this. Also submit evidence of any repayment of Corona aid.</i>			

## Income Tax Checklist

Information and documents required to prepare your income tax return

Information on Extraordinary Expenses				
<i>Please attach the original invoices/certificates and proofs of payment.</i>				
Medical Expenses not covered by insurance				
e.g. Medical expenses, Eyeglasses, Medications, Dental Prosthesis, Cure	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Disabled person's pass				
Disabled person's pass	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Other Extraordinary Expenses				
Expenses to the support another person	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Care of helpless person or persons from care level 2 to 5	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Funeral Expenses	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Travel Expenses	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No

Household related Services				
Craftsman Invoices (e.g. Modernizations, Reparations, Garden Design, Chimney Sweeper)	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Energy measures in connection with the renovation of buildings in private households (replacement of windows, heating)	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Household related Services (e.g. Cooking, Ironing, Garden Care, Window Cleaning)	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No

### Attachments

## Income Tax Checklist

Information and documents required to prepare your income tax return

The following attachments apply:

Children	➡ Attachment 1	<input type="radio"/> Yes	<input type="radio"/> No
Agriculture and Forestry	➡ Attachment 2	<input type="radio"/> Yes	<input type="radio"/> No
Business Income	➡ Attachment 2	<input type="radio"/> Yes	<input type="radio"/> No
Business Income (Photovoltaic System)	➡ Attachment 2	<input type="radio"/> Yes	<input type="radio"/> No
Freelance Income	➡ Attachment 2	<input type="radio"/> Yes	<input type="radio"/> No
Employment	➡ Attachment 3	<input type="radio"/> Yes	<input type="radio"/> No
Capital Investment	➡ Attachment 4	<input type="radio"/> Yes	<input type="radio"/> No
Rental Income	➡ Attachment 5	<input type="radio"/> Yes	<input type="radio"/> No
Other Income	➡ Attachment 6	<input type="radio"/> Yes	<input type="radio"/> No
Questions or Comments	➡ Attachment 6		

Information and documents required to prepare your income tax return

first name	different last name	Date of birth	different address	childcare expenses	Parent relationship with taxpayer	Parent relationship with wife	Reason for Consideration
					<input type="radio"/> Natural Child <input type="radio"/> Foster Child <input type="radio"/> Adoptive Child	<input type="radio"/> Natural Child <input type="radio"/> Foster Child <input type="radio"/> Adoptive Child	<input type="radio"/> Vocational Education <input type="radio"/> Study <input type="radio"/> seeking employment
					<input type="radio"/> Natural Child <input type="radio"/> Foster Child <input type="radio"/> Adoptive Child	<input type="radio"/> Natural Child <input type="radio"/> Foster Child <input type="radio"/> Adoptive Child	<input type="radio"/> Vocational Education <input type="radio"/> Study <input type="radio"/> seeking employment
					<input type="radio"/> Natural Child <input type="radio"/> Foster Child <input type="radio"/> Adoptive Child	<input type="radio"/> Natural Child <input type="radio"/> Foster Child <input type="radio"/> Adoptive Child	<input type="radio"/> Vocational Education <input type="radio"/> Study <input type="radio"/> seeking employment
					<input type="radio"/> Natural Child <input type="radio"/> Foster Child <input type="radio"/> Adoptive Child	<input type="radio"/> Natural Child <input type="radio"/> Foster Child <input type="radio"/> Adoptive Child	<input type="radio"/> Vocational Education <input type="radio"/> Study <input type="radio"/> seeking employment

If your child is over 18 years old and still in education / studies, please submit us the employment tax statement or enrollment certificate.

## Information and documents required to prepare your income tax return

### Income from Agriculture & Forestry, Business Operations or Self-Employment

for business or freelance income, domestic and abroad (also secondary or of minor importance, also investment income)

All Revenue and Expenditure Documents	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
---------------------------------------	---------------------------	--------------------------	---------------------------	--------------------------

Business income with Photovoltaic System		
Bank Statements		
Documents for Purchase		
Repair Invoices e.g. for roof renewal		
Agreement with net provider		
Annual Settlement		
In case of external Financing: Loan Extract		
Insurance Documents		
Prepayments for sales tax		
e.g. travel costs, telephone, internet		

### Income from secondary activities

Trainer	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Instructor	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Educator	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Attendant	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Artistic Activity	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Care of old / sick / disabled people	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No



## Information and documents required to prepare your income tax return

Income from employment		
Revenues		
Income Tax Certificate		
Unemployment benefit		
Maternity benefit		
Parental benefit		
Transitional benefit		
Sickness benefit		
Insolvency benefit		
Capital-Forming benefit		
Expenses		
Commuting between home and place of work	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
One way distance in km		
Number of days		
Contributions to professional associations		
Further Education		
Professional Publications		
Professional Supplies		
Working Clothes		
Moving Expenses		
Application Expenses		
Employment Trips		
Home Office	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Number of days in home office		
Enclosed Home Office?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Was a workstation available at the employer (voluntary home office)?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Double budgeting	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Double budgeting	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

## Information and documents required to prepare your income tax return

Capital Investment (Global Investment Income)				
Certification of credit institutes	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Original tax certificate	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Silent investment	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Private Loan	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Certification of losses and income on disposal	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No



## Information and documents required to prepare your income tax return

Rental Income	Property 1	Property 2
General Information		
Street		
Postcode, Place		
Size of Property		
year of construction / Purchase Agreement		
Revenues		
Rental Income (Rental Agreements)		
Allocation		
Miscellaneous rental Income		
Garage rental		

Expenses		
Interests and Bank Charges		
Repair Expenses		
Property tax		
Chimney Sweeper		
Home Insurance		
Trips to the property		
Administrator costs		

Rental Income	Property 3	Property 4
General Information		
Street		
Postcode, Place		
Size of Property		
year of construction / Purchase Agreement		
Revenues		
Rental Income (Rental Agreements)		
Allocation		
Miscellaneous rental Income		
Garage rental		

Expenses		
Interest and Bank Charges		
Repair Expenses		
Tax Assessment		
Chimney Sweeper		
Home Insurance		
Trips to the property		
Administrator costs		

Information and documents required to prepare your income tax return

Other Income

Pension			
Pension Calculation	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Disability Pension, Widow's Pension	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Start of Pension			
Amounts received			

Miscellaneous Income			
benefits received	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Disposal of Real Estate	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Loss carried forward for miscellaneous Income	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Questions, Meeting Points or Comments

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---