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## Information regarding your tax declaration

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### Documents necessary for the preparation of your tax returns for the relevant calendar year:

<b>Certificate of Wage Tax Deduction</b>	- Electronic certificate of wage tax deduction 01 January – 31 December
<b>Notice of Income Tax Assessment</b>	- Please bring along your last notice of income tax assessment, if available.
<b>Employment Replacement Benefits</b>	- Notices of assessment of unemployment benefits/ sickness benefits / maternity benefits
<b>Bond Yields</b>	- Pension receipt notifications and notifications according to Section 22 Number 5 of the German Income Tax Act - Proof of invalidity pensions/ widow's pension/ pension annuity/ private pension scheme
<b>Capital Yield</b>	- Annual certificate for tax purposes and similar (no bank statements)
<b>Children</b>	- above the age of 18: education certificate / military service / unemployment certificate including statement and/or proof of own income - child care expenses up to the age of 14 (proof of payment required) as from 2012: Discontinuation of means testing concerning children of full age with regard to their first educational training
<b>Private Capital Gains</b>	- Documents on revenue/ expenditures/ annual bank certificates
<b>Letting and Leasing</b>	- Documents (expenses, statement of loan interest, where applicable)/ rental income/ contracts (purchase contract, lease contract, loan contract)/ housing benefit invoice - "AFA-Tabelle" (tax depreciation table) where applicable, in case it has already been calculated.
<b>Riester Pension</b>	- Certificate of insurance provider (e.g. Riester pension) An annual tax statement is mandatory!
<b>Certificate of EU/EWR</b>	- If the spouse is resident abroad (in a European country outside Germany)

**Please bring along all documents to your consultation appointment,  
which you consider to be relevant for tax purposes.**

Please check your expenses for „potential tax deductions“ in connection with (for example):

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| <b>Office equipment</b>                       | - Work-related material: Computer/ brief case/ tools/ work gear/ stationery/ specialist books/ work material/ maintenance  |
| <b>Work Room</b>                              | - Rent/ ancillary rental costs/ confirmation of employer/ sketch of floor plan   |
| <b>Disability</b>                             | - Disabled pass/ pension office assessment notice  |
| <b>Contributions to Business Associations</b> | - Trade unions e.g. IGM /Verdi   |
| <b>Job-Seeking Expenses</b>                   | - Application letters/ advertisement fees/ copy-/ postal-/ travel expenses regarding job interviews, and similar   |
| <b>Household-Related Services</b>             | - Invoices on garden maintenance/ cleaning work/ relocation costs/ domestic minor repairs/ janitorial activities etc. (proof of payment/ bank statement required)<br>- Utilities statement<br><br>- Employment of personnel in your household for the aforementioned activities (proof of payment of salaries and paid taxes required) |
| <b>Costs of Divorce Proceedings</b>           | - Lawyer fees/ court fees  |
| <b>Donations</b>                              | - A receipt of the donee is required, a bank statement may be sufficient   |
| <b>Tax Consultancy</b>                        | - Membership fee „Lohnsteuerhilfe“ (Income Tax Assistance)/ invoice tax advisor  |
| <b>Insurance</b>                              | - Life/ accident/ health/ automobile/ personal liability   |