

Checklist for your annual tax return

Receipts and records to be submitted to the German IRS (if applicable)

Please check off the items that apply to you

I. General

- Bank details
- Forms of tax assessment
- Advance tax payments
- Religious denomination
- Changes in marital status
- Tax number and personal ID No.
- Last tax statement
- Splitting or basic rate, etc.

II. Employment, wage replacement benefits and income-related costs

- Annual electronic income tax statement(s)
- Severance pay
- Partial retirement
- Records of wage replacement benefits, such as unemployment benefits (ALG I), short-time work, insolvency benefits, sick pay, etc.
- Records of other work-related expenses
- Records of periods without employment
- Foreign income
- Professional associations
- Work equipment
- Specialist literature
- Business trips
- Work errands
- Business travel
- Job applications
- Tax counseling
- Computer equipment
- Maintenance of two households
- Continuing education
- Capital investment benefit records for a savings bonus
- Determining the distance to the workplace, etc.

III. Insurance, special expenses, pension expenses

- Life insurance
- Private annuity / social insurance
- Accident insurance
- Private health insurance
- Private long-term care insurance

- Private liability insurance
- Car insurance
- Pet owner liability insurance
- Other Insurances
- Matrimonial maintenance
- Annual certificates of savings for Riester and Rürup pensions
- Tuition fees, vocational training fees, etc.

IV. Donations

- For non-profit or charitable organizations and political parties
– please include donation receipts and proof of payment –

V. Extraordinary expenses

- Proof of a physical disability
- Support for indigent persons
- Employment of domestic help
- Lawyer and court costs
- Own expenditures for medical care
- Medical expenses, medicine, optician, convalescent care, care services
- Household and maintenance services, moving costs, etc.
– Please include invoices and proof of payment – e.g. the service charge bill of the landlord

VI. Children

- Birth certificate
- Education and training certificates
- Personal income of the child
- Childcare and school fees
– Please include invoices and proof of payment –

VII. Pension and retirement income

- Recent pension records, effective date of pensions

VIII. Capital assets, income from rent and lease

- Business comparison of revenue and expenditure
- Annual tax statements of financial institutions, etc.
- Interest credit, etc.
- Revenue and expenditure records for rented apartments or houses