Mandat/Name: _____

General Checklist (simple form) for your annual tax statement

Contains tax information applicable to the annual tax statement of income and expenses that may be submitted to the German IRS in order to state the personal circumstances.

Please check the line items which are applicable to you. A simple checkmark will suffice.
A second form may be needed for spouses or more than one year.

To fill in the form we recommend the free Adobe Reader: https://get.adobe.com/reader/

I. General

☐	Bank details		
☐	Tax assessment form		
☐	Tax prepayments		
☐	Denomination		
☐	Change in marital status		
☐	Tax number and personal ID		
☐	Last tax statement		
☐	Splitting or basic tariff, etc.		

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

☐	Electronic annual employment tax statement(s)		
☐	Compensations		
☐	Semi-retirement benefits		
☐	Proof of wage replacement benefits (1)		
☐	Other receipts		
☐	Proof of periods of unemployment		
☐	Foreign income		
☐	Professional associations		
☐	Work material		
☐	Technical literature		

☐	Business trips		
☐	Business errands		
☐	Business travel		
☐	Job applications		
☐	Tax consulting		
☐	Computer, etc.		
☐	Double budgeting		
☐	Continuing education		
☐	Employee savings bonus certificate		
☐	Determining distance to the workplace, etc.		

(1) Wage replacement benefits: e.g. ALG I, short-time work, insolvency benefits, sick pay, etc.

III. Insurance, special expenses, retirement expenses

☐	Life insurance	
☐	Private retirement insurance	
☐	Accident insurance	
☐	Private health insurance	
☐	Private nursing insurance	
☐	Private liability insurance	
☐	Car insurance	
☐	Pet owner liability insurance	
☐	Other insurance	
☐	Spousal support	
☐	Savings for Riester or Rürup pension	
☐	Tuition fees, costs of continuing education	

IV. Donations

☐	Donations (1)	

(1) for charitable or non-profit use and political parties; donation receipt and proof of payment is required

V. Exceptional costs

☐	Disability certificate	
☐	Support of needy persons	
☐	Employment of domestic help	
☐	Legal and court costs	
☐	Personal expense for medical care	
☐	Medical fees, medicine, optician, treatment and care service	
☐	Domestic services, etc. (1)	

(1) provider invoice and proof of payment is required, e.g. statement of rental costs

VI. Children

☐	Birth certificate	
☐	School and education certificates	
☐	Child's personal income	
☐	Child care and school fees (1)	

(1) receipt and proof of payment is required

VII. Retirement

☐	Last retirement statements		

VIII. Capital assets, rental and leasing

☐	Commercial statement of income and expenses	
☐	Annual bank tax statements, etc.	
☐	Income schedule	
☐	Records of rented-out apartments and houses	

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City, Date Signature 1 Signature 2

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