

These documents are required for your income tax return 2016

With joint assessment, signature of both partners is requested!

General documents

- Tax number
- Identification number
- Income tax assessment 2015
- Preliminary income assessment
- Proof of disability
- Bank account statements

Income and earnings statements

- Electronic wages and tax statement
- Statements of maternity benefits, disability benefits, parental benefits, unemployment benefits, interim payment as well as insolvency payments
- Employment termination compensation agreement/severance pay agreement
- Compensation payments received
- Notice of pension granted (also from abroad)
- Pension income statement
- Notice of pension adjustment
- Rental income (tenancy agreement, utilities statements)
- Declaration of profits from capital income and sales of financial investments
- Tax certifications for deducted flat rate withholding tax
- Foreign interest statements (withholding tax)

Income-related expenses for employment

Receipts and evidence for:

- Expenses for labour court lawsuits (lawyer, court)
- Company car e.g. logbook, invoices
- Contributions to professional associations/unions
- Material required for work e.g. computer, tools, work clothes
- Home office
- Expenses for further education e.g. course fees, travel expenses
- Job application expenses
- Expenses for tax consultant
- Moving expenses
- Travel expenses (employers' conf. of business travel)
- Double household (rent, ancillary rental costs)
- Accident costs (on trip to work)

Income-related expenses for rent and lease

Receipts and evidence for:

- Evidences for purchases, constructions costs (depreciation)
- Loan interest
- Maintenance costs
- Real estate tax, street cleaning, refuse collection, water supply, drainage, electricity, heating, insurances e.g.
- Administration expenses, utilities statement

Children

- Identification number
- Contract and proof of payment for child care
- Apprenticeship contract/proof of university enrollment
- Certification for military service or civilian service
- Personal income of child (wages and tax statement, interest statement, rent and lease income, Bafög-certificate)
- School fees for a private school
- Proof of disability

Special expenses/preventive care expenses

- Insurance contributions (liability-, accident-, health-, nursing care-, life-, disability insurance)
- Private retirement plans (Riester-Rente, Rürup-contracts)
- Benefits and donations (donation receipt)
- Expenses for own professional training

Extraordinary expenses

Receipts and evidence for:

- Practice fee, medication, dentist, glasses
- Travel costs to doctor and pharmacy
- Expenses for doctor and alternative practitioner
- Hospitalisation (dates and receipts)
- Rehabilitation (medical officer's certificate)
- Medical aids (bed, stair lift,...)
- Costs for divorce/funeral
- Care level certification
- Institutional care/household care
- Alimony to relatives
- Alimony to children (e.g. over 25 years old, in education)

- Alimony to refugees from Syria (declaration of commitment)

Further documents for saving tax

- Services of craftsmen (chimney sweeper, drain cleaner, electrician, window fitter, roofer, carpenter, plumber, tiler, painter e.g.)
- Services related to household (gardening, household care, au pair, nursing service e.g.)
- Utilities statement from property management or the landlord

➤ Expenditures may only be deducted on presentation of an account statement (bank transfer obligatory). Just wages are deductible (possibly plus VAT), material expenses are not deductible.

- Application for housing subsidy.
- Riester: Application for bonus for private retirement plans
For first inception of contract as well as upon birth of a child and at the end of education of a child.

This is not a complete list!

In order to reduce your tax burden, it is absolutely recommendable to take advantage of our personal extensive advice.

HILO®

Arbeitnehmersteuern
überall in Deutschland

www.hilo.de