

Checklist

Here is a list of the most important documents that you should bring with you to your consultation with Steuerring.

Documents that we still need will be determined in a personal meeting and can be handed in later.

General information

- > ID card or passport - must be presented and copied for identification purposes at the initial consultation due to a legal obligation.
- > Tax number, tax identification number
- > Income tax assessment from the previous year / Advance payment assessment
- > Bank statements from the year concerned, if applicable

Proof of income

- > Electronic income tax statement(s)
- > Statement on the amount of paid
 - > unemployment benefit
 - > Sickness benefit, maternity benefit, parental benefit
 - > Transitional allowance
 - > Insolvency default money (from the Agentur für Arbeit)
- > Severance payment, severance agreement / termination agreement
- > pension assessment notices / pensions adjustment notices / pension payment notices
- > Notary contract with agreed purchase price annuities
- > Rental income, rental agreement, proof of receipt of payment
- > Tax certificates and statements of income on interest and other capital income
- > Interest portion of non-interest-bearing receivables
- > Maintenance payments received in the case of real splitting (Annex U)
- > Benefits received in connection with pension equalization

Expenses not from self-employment

- > Proof of travel costs, kilometer statements
- > Contributions to professional associations (trade unions)
- > Invoices / receipts for work materials
- > Invoices / receipts for typical workwear
- > Expenses for a workroom
- > Travel costs (statement from employer, reimbursements)
- > Expenses resulting from continued vocational training, e.g. to become a Master or a specialist, study costs for initial training > Application costs
- > Relocation costs for professional reasons
- > Maintaining two households (second home rental contract and proof of payment)
- > Tax consultancy costs, e.g. contribution from income tax aid associations

Expenses from the subletting of your living space

- > Interest on loans, interest portion of non-interest-bearing receivables
- > Maintenance expenses
- > Property tax, water, sewage, electricity, garbage collection fees, operating costs of the heating system - such as maintenance, fuel, list of additional costs (from homeowner association)
- > Incidental cost statement with the tenant

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Children

- > Tax identification number
- > Childcare costs (contract, invoice, proof of payment)
- > Apprenticeship contract / certificate of study / school certificate
- > electronic income tax certificate(s) of the child
- > Notification of half-orphan's benefit > Notification of cancellation of child benefit
- > School fees paid for beneficiary schools > Health and care insurance contributions for privately insured children

Special expenses

- > Utility expenses, such as health and long-term care insurance, disability and occupational disability insurance, accident and (motor vehicle) liability insurance, life and pension insurance
- > Certificates for private old-age provision (Riester pension) and private life pension insurance (Rürup or basic pension)
- > Donations / contributions
- > Costs for own vocational training (certificate of participation, invoice for participation fee)
- > Paid maintenance services in the case of real splitting
- > Benefits received in connection with pension equalization
- > Tax identification number of the supported or receiving person

Exceptional costs

- > Medical costs, such as medication, self-paid doctor's fees, glasses, settlement with health insurance and aid authority, travel expenses
- > Care expenses
- > Funeral expenses, proof of assets of the deceased
- > health resort costs (medical certificate before the start of the health resort)
- > Costs for alternative practitioner
- > Support to relatives (proof of payments, proof of own income, income and assets of the supported person, tax identification number)
- > Identity card for disabled people
- > Proof of care level or degree of care

Other documents that are worth your money

- > Craftsman services, e.g. chimney sweep, electrician, window fitter (invoice and proof of payment required)
- > Household-related services, e.g. gardening, domestic help, nursing service, transport costs for private moves (invoice and proof of payment required)
- > Incidental cost statement from property management / landlord
- > Certificate from the investment institute on the electronic transmission of the asset-creating services
- > Application for housing subsidy

Proof of payment is always understood to be a confirmation of payment or transfer of funds from the bank or a bank statement.

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