



General information:

- New intake: Tax Identification Number (of all family members), last tax assessment (if available: copy of last tax return), phone number, email address
- Current bank account: IBAN
- When changes in family status occur: Certificate of marriage, birth and death
- When leaving the Church: Copy of certificate of resignation

Income:

- Electronic wage and tax statement
- Certification "Baulohnkasse / SOKA Bau"
- Contracts concerning severance agreement / partial retirement agreement
- Certification of unemployment benefit, insolvency wage, sick benefit, maternity benefit, parents money, temporary allowance, injury benefit
- Capital-forming benefits ("Anlage VL")
- When receiving pensions (pension awards + pension increase notice or pension change notice)
- Annuity payment certification or yearly pension award
- Aliment payments to the separated or divorced marital partner
- Income from external mandates and activities
- Documents concerning foreign income/wages

Income from capital assets:

- Certificates for tax purposes and income statements of all banks
- Documents about foreign capital income

Rental income / Lease income:

- Floor area and living area distribution
- Gains (cold rent + shares in the costs)
 - (tenancy agreements, lease agreements, utilities statements previous year + the year before)
- Spending/Outgoings:
 - custodian statements, credit expenditures, property tax, insurances, domestic electricity, interests, construction invoices, maintenance invoices

Business owner: photovoltaic systems:

- Information about the production per year in Kwp
- network operator statement
- Invoices for the photovoltaic system, service, insurance etc.
- Electricity costs charged to tenants

Do you have further gains?

- If you do then please bring the appropriate documents (documents of earnings and expenses)

Children:

- Birth certificate (if birth is in tax year)
- Tax Identification number
- To 14 years of age: Care costs (nanny, Kindergarten, hoard, babysitter)
- From 18 years of age: Proof of nonresidence. For a second apprenticeship: Proof of gainful employment
- School fee
- Certificate of disability
- Private health insurance

Income-related expenses:

- Labor union or professional associations contributions
- Legal cost / accident and duty liability insurance contributions
- Journeys domicile à job (distance + number of workdays) for more than 20.000 km p. a. please save the car workshop or MOT invoices as proof note the mileages
- Bring along the pay slip for a company car, certificates for self beared costs in the context of company car
- Business trips, external activities (we hold corresponding forms ready for you)
- Own share for accident costs on your way to work
- Job-related moving expenses (f. e. costs for real-estate agents, night stop, forwarder, rental car, rental compensation)
- Application expenses (travel costs, application letter etc.)
- Work equipment f.e. work clothing (PC, professional literature, notebook, desk etc.)
- Expenses concerning double housekeeping (rent, utilities, organization of the second home)
- Further education and apprenticeship costs (costs of participation, travel costs, teaching material, accommodation expenses, costs of second job training etc.)
- Costs for study room (living area distribution, layout, bill of utility costs, rental agreement, costs for furnishings)

Extraordinary personnel expenses:

- Certificate to „Riester-Rente“ or „Rürup-Rente“ - (VBL, ZVK or private assurer)
- Annual certificate of private health insurance
- proofs for insurance premiums f.e.(life-, accident-, health additional-, liability-insurance)
- Donation receipts (to parties, charitable organisations f.e. "DRK", "ASB", fire department etc.+ Statements of account by missing receipts)

Extraordinary burdens:

- Own share payment for medicine, glasses, dentist, cure, physician-directed
- Costs of divorce
- Funeral costs (if not covered by the property)
- Proof of a handicap
- Alimony/benefits to children (without demand for child allowance), parents or to the life partner and evidence of the supports person
- Alimony to family members living abroad are to be proved with payments and certificates from the foreign authorities in official form

We are able to give you certificates in different languages for foreign authorities.

Household-related employment relationships, services and craftsman services

- Concerning this please regard the hints on the backpage!



This is not a concluded list!
Please bring all documents of which you think are fiscal necessary for the consulting.
Don't worry – missing documents can be given later.

Check list household-related services – performed by a service provider

- Cleaning of the domicile and the staircase, washing, cooking, ironing
- Garden upkeep, winter service, street cleaning
- Moving expenses (invoice of the moving company)
- Care and support services in the old peoples home or in assisted living, according to billing

Check list craftsman services – performed by a company or a service provider

- Typical and annual: chimney sweep, heating maintenance, reading and measurement services
- Works on interior and exterior walls
- Works on the roof, frontage, garage or the like
- Repair or replacement of windows and doors
- Paint / varnish of doors, windows (inside and outside), closets, radiators and heating tubes
- Repair or replacement of floorings (e.g. carpets, parquet, slabs)
- Repair, maintenance and replacement heating systems, electrical installations, plumber and heating installations
- Modernization or replacement of the fitted kitchen
- Modernization of the bathroom
- Repair and maintenance of objects in the household of the tax payer (e.g. washing machine, dishwasher, stove, television, personal computer)
- Arrangements for landscape gardening
- Paving works on the property
- Controlling expenses (e.g. charge for chimney sweep)

Requirements for the deduction

- ✓ Only expense of time and labour including the invoiced travel costs plus turnover tax are benefited.
- ✓ All works have to be performed in the household or on the premises.
- ✓ You have to indicate the part of the labour costs separately in the invoice.
- ✓ Invoice of the company and proof of payment (bank statement) have to be enclosed. Cash payments will not be accepted.
- ✓ For minijob expenses plus additional costs of the miner's guild and the trade association.
- ✓ **Not benefited** are expenses which are supported publicly by low-interest loans or taxless grants

Apartment owner / tenant

- ✓ The annual statement of the additional costs or a certificate of the lessor or his administrator.

The corresponding contributions for benefited services / craftsman services which were paid in the current year are listed separately in the annual statement.

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