



reply to:

fax: 0911 – 801 90 911

postal address:

steuermachen.de

Nordostpark 102a

90411 Nuremberg, Germany

:: your tax checklist ::

Dear client,

please find attached **your tax checklist** with a list of the most important supporting documents possibly required to prepare your income tax return:

- **Transmit the supporting documents** (usually copies are sufficient, this does not apply to explicit marked items), which you think are relevant for taxation, immediately to the above mentioned postal address with this covering letter by **mail** or by **fax** or by **e-mail** to:
dialog@steuermachen.de with a **subject including your name or order number!**
Otherwise the transmitted documents may not be related to you.
- **Transmit the documents together with the signed letter of attorney** for the assigned tax accounting firm

Missing supporting documents can be handed in later as long as the taxation procedure is not fully completed. The assigned tax accounting firm will contact you if questions arise and after examination of the documents.

Revenue:

- Wage tax certificate(s), for new clients the tax return or tax bill of the previous year, if possible, advance tax payment notice (attention, the past years including 2013 may be edited! Contact your assigned tax accounting firm!)
- Notifications on unemployment benefits, sickness benefits, transitional payment or compensation money in case of insolvency
- Compensation agreement and cancellation agreement
- Latest notice of pension entitlement or current pension adjustment notification
- Notifications on capital gains tax (e.g. on interest, stocks and bonds etc.)

Special expenses deduction:

- Expenses of a provident nature (insurances for sickness, life, accident, liability, nursing care)
- Notifications on private pension (Riester and Rürup pension)
- Documents or account statements on donations and grants
- Documents on own vocational training (Notifications, bills, account statements)

Professional expenses:

- List and supporting documents on travel expenses, information on workplaces
- Contributions to professional associations (Unions)
- Documents on work equipment, literature, computer, typical workwear, professional development etc.
- Expenses on an office (lease agreement, rent payments, electricity costs, furniture etc.)
- Employer documents of refunds on travel expenses, list of travel expenses
- Documents on application expenses
- Double budgeting (period of time, lease agreement for the second home and proof of payment)
- Tax advisory costs (including contributions on an income tax assistance union, tax software and literature)

Exceptional costs:

- Medical expenses (medicines, dentures, spectacles, travel expenses, practice fee, expenses on spa treatments etc.)
- Expenses on funerals or divorce
- Alimony for relatives (proof of payment, proof of revenue and salaries of the relatives)
- Disabled person's pass for the disabled persons standard amounts

Children:

- Apprenticeship contract / certificate of study / notification on military service or civilian service
- Information on revenue and salaries
- Paid school fee for supported schools

Other documents to save money:

- Craftsman services and household-related services (bills, **proof of payment**), billing of the incidental expenses of the property management or the landlord
- Annex VL (capital-forming benefits) **in the original**
- Application housing subsidy

Additional checklist for property owners and landlords:

- Lists on rental incomes, annex V of the latest tax return for new clients
- Notarial purchase agreement or deed of donation
- Postal Address of the estate, year of the completion or year of the purchase, type of property
- Expenses on real estate: notice on property tax, notary fees, court costs
- Expenses on renovations, repairs, property management costs, house maintenance costs
- Incidental expenses (insurance, heating, electricity, water, waste, waste water etc.)

Please note that: The list is not exhaustive. This list makes no claim to completeness and cannot replace a legal or tax advice by an authorised person. Please transmit all supporting documents, of which you think, might be relevant for tax purpose to the assigned tax accounting firm.