

# Check list of documents for your income tax return

**LohiBW**

Lohnsteuerhilfe  
Baden-Württemberg e.V.  
Lohnsteuerhilfverein  
seit 1968



## Change in personal circumstances

- Marriage or partnership certificate**
- Declaration of leaving the church**
- Wage tax certificate**
- Proofs of **wage compensation benefits**  
e.g. unemployment benefits, insolvency payments, sickness benefit, transitional allowance, parental benefits, Hartz IV benefits
- Asset formation**  
Investment in savings schemes, application for housing subsidy

## Children

- Birth certificate**
- Childcare expenses**  
Bills, fee notifications, bank account statements
- School fees**

## Children over 18 years

- School attendance certificate or university enrolment certificate, apprenticeship contract**
- Proofs of **search for apprenticeship position, voluntary social year, Federal Voluntary Service**
- Income** during the corresponding period (BAföG study grants, wage tax certificate, mini-jobs, pension)
- In case of **accommodation away from home** (period), address of the residence, rental agreement

## Professional expenses

- Membership fees** to trade union, professional association
- Expenditure on **work equipment**  
Technical literature, tools, computers, professional clothing
- Application expenses**
- Professional advanced training / vocational training** course fees, travel expenses, office equipment, technical literature, Internet, telephone, PC
- Workroom:**
  - Size of the house and the workroom
  - Proof of expenses (rent, utilities, repairs, purchases)
- Tax consultation expenses**
- Business trips**, external and travel activities
  - Certificate issued by employer
  - for trips with own car: List of work locations with specification of distance

- Maintenance of two households**  
Rental agreement and utility bills of the second house, number of trips to home (proofs)
- Relocation expenses:**  
Expenditure on freight forwarding, rental car, brokers
- in case of **accident** from or to the workplace, accident record, repair bill

## Rented property

- Rental income and levies (possibly, rental agreements)
- Interest on debts, property tax, water, heating costs, chimney sweep, insurances, bills of the property management, repair costs, etc.

## Proofs for retired persons and pensioners

- Wage tax certificate**  
(company pension, pension)
- Proof** of other retirement benefits e.g. ZVK (Zusatzversorgungskasse - Supplementary pension fund), VBL (Versorgungsanstalt des Bundes und der Länder - Federal and State Government Employees Retirement Fund), insurance annuities
- Notification on drawing of pension** of the statutory pension scheme, via, e.g. old age, widow's, disability pension
- Pensions from abroad

## Other proofs of

- Donation receipts**  
e.g. donations to charities, church or political parties
- Contributions to insurances**  
Premium invoice or insurance policy of pensions, health, accident, education, life and liability insurance
- Riester-pensions**
  - Certificate in accordance with § 92 EstG (Income Tax Act)
- Rürup pensions**
- Subsistence payments** (Germany/abroad)
  - Official certificates on the need of the persons supported
  - Proof of subsistence payments
  - Proof of travel, acknowledgements of receipts, own income of the persons supported
  - Annex "U"
- Physical disability**
- Expenditures on **care and home care** Proof of the need for care of the person provided care
- Medical expenses**  
Bills of pharmacies, doctors, dentists, orthodontists, naturopaths, opticians
- Funeral expenses**
- Income from abroad**  
e.g. pensions, rental incomes, capital investment income

**Capital investment income** (e.g. interests, dividends)

- Tax certificates
- Copy of the exemption orders

**Private sales transactions**

- Bill with proof of payment (bank account statement)
- Utility bills (caretaker, garden maintenance, winter service, chimney sweep, maintenance, repairs)

e.g sale of real estate Proof of costs of acquisition and sales proceeds

**Bills of craftsmen / household-related services** (no cash payment)

*This is not an exhaustive list. To reduce your tax burden, an individual consultation is essential in a discussion in person. No tax software can substitute a personal consultation.*