

TAX CHECK LIST

Family name:	First name:	
Residence:	ZIP:	City:
ID number:	Tax number:	

Which documents	✓
Tax return or tax assessment notice from the previous year (only for new members)	<input type="checkbox"/>
Printout of the electronic payroll statement for 2010 (years 2009, 2008 and 2007 may also be processed)	<input type="checkbox"/>
Proof of the receipt of unemployment assistance, parental child care benefit, sick pay, asset-building benefits statement (original)	<input type="checkbox"/>
Retirement / pension benefit notice or current retirement / pension adjustment notification	<input type="checkbox"/>
Annual bank statement regarding capital proceeds and sales transactions (original)	<input type="checkbox"/>
Statement of receipt of retirement subsidies under the German Riester Plan pursuant to § 10a	<input type="checkbox"/>
Subsection 5 Income Tax Act (Einkommensteuergesetz, EstG) (original)	<input type="checkbox"/>
Statement of receipt of retirement subsidies under the German Rürup Plan in accordance with the new old-age retirement program, insurance premiums (e.g. health, long-term care, liability, auto and life, accident, occupational legal expenses insurance)	<input type="checkbox"/>
Donation receipts, tuition, church contributions, church tax assessment notice	<input type="checkbox"/>
Computer, printer, reference literature, continuing education expenses, cost of maintaining two households, accident-related costs, home office, job application costs, breakdown of travel expenses, tax consulting expenses, union dues	<input type="checkbox"/>
Name and birth dates of children, child care costs, tuition	<input type="checkbox"/>
Proof of disability or of level of long-term care (also for spouse and children)	<input type="checkbox"/>
Expenses for divorce, funeral, maintenance (family/partner)	<input type="checkbox"/>
Sickness-related expenses (medications, dental, glasses, inpatient rehabilitation, alternative healing) medical office fees	<input type="checkbox"/>
Home repair bills and account statements as proof of payment, resident utility statements issued by the property management or landlord.	<input type="checkbox"/>

This list is not complete. Many costs and expenses can be established automatically.
We will contact you if we need additional documents for the completion of your tax return.

