

## TAX RETURN CHECKLIST for your tax return 2016

...What is the next step?

In order to ensure that we can work out the best conditions for you, please fill in the following tax return checklist, attach the ticked off documents and forward it to us

### Personal Data

	Taxpayer	Spouse
ID number		
Tax number		
Name		
First Name		
Street		
Zip code, place of residence		
Date of birth		
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> married <input type="checkbox"/> divorced <input type="checkbox"/> widowed	<input type="checkbox"/> Living apart <input type="checkbox"/> registered <input type="checkbox"/> live partnership
Account details (for tax refund)	Bank Account number	Sort code (BLZ)
	IBAN	BIC
Only for those who have already been members last year	<input type="checkbox"/> Tax assessment of last year	

### Children/Schooling Fees/Child Support Costs

Name	
First Name	
Date of Birth	
Filiation relationship to other persons (Name, address, date of birth)	<input type="checkbox"/>
Have you paid school fees? This also applies for school fees within the EU/EWR	<input type="checkbox"/> Certificate of the school authority and proof of payment for other services than accommodation, child care and catering
Child Support Costs for children up to 14 years	<input type="checkbox"/> Proof of contract and proof of payment

### Consideration of child of age

Proof of vocational training	<input type="checkbox"/> Certificate of the school authority or any other authority or address of the current accommodation
Is the child in an external vocational training and/or accommodation? (Not at the parents house)	<input type="checkbox"/> Certificate of the school authority or other authority

### Occupation

Are all certificates of the wage tax 2016 available?	<input type="checkbox"/> Printing of the electronic certificate of the wage tax 2016
Have you received substitution benefits within the assessment period?	<input type="checkbox"/> Certifications for unemployment benefits, sickness benefits, parental benefits etc...
What is the traveling distance to your workplace? Address: _____ Number of workdays per week: _____ Used means of transport: _____	<input type="checkbox"/>
Contributions to professional organizations, trade unions	<input type="checkbox"/> Proof of payment
Means for work, telephone costs, briefcase, notebook/PC, photos for applications, transport to job interview(s)	<input type="checkbox"/> Proof of payment
Business trip – distance- accommodation – individual costs (Did you receive a reimbursement from your employer?)	<input type="checkbox"/> Proof of payment; proof of connection to your occupation
Did you have any expenses for a study at home?	<input type="checkbox"/> Proof of payment, proof of connection to your occupation
Second Estate	<input type="checkbox"/> Rental contract of both estates, proof of costs, your own household needs to be at the center of your life interests
Did your occupation cause moving costs?	<input type="checkbox"/> Proof of payment, proof of connection to your occupation

### Retirement

Did you receive retirement benefits, unemployment benefits or a widow's/widower's benefit?	<input type="checkbox"/> Retirement certificate, notices of indexation of pensions
Did you receive a pension form the Versorgungswerk (pension fund)?	<input type="checkbox"/> Certificate
Did you receive retirement benefit form foreign insurance companies?	<input type="checkbox"/> Retirement certificate
Did you receive retirement benefits from a "Rürup-Vertrag" or "Riestervertrag" or any other contract of occupational retirement benefits?	<input type="checkbox"/> Certificate

### Capital Assets

Is your personal tax rate below 25%? We can undertake a "Günstigerprüfung" (check the most favorable tax income)	<input type="checkbox"/>
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### Additional income

Did you have to pay alimony to your divorced partner or to your partner who lives constantly apart from you?	<input type="checkbox"/> Enclosure U (Anlage U) – contractually divorce agreement
Did you sell private estates within ten years after you acquired them? (Did you use need them for personal use?)	<input type="checkbox"/> Sale and re-sale agreements, utilities

### Special Expenses

Did you have to pay alimony to your divorced partner or to your partner who lives constantly apart from you?	<input type="checkbox"/> Contract, amount of payment, signed enclosure U (Anlage U)
Did you have any expenses for your vocational training (first training/studies)? No professional expenses?	<input type="checkbox"/> Invoices for means of work, technical literature etc. commuting allowance
Did you donate to any society or pay a contribution to any party during the assessment period?	<input type="checkbox"/> Original donation receipt, receipt of contribution
Did you pay additional contributions to professional "Versorgungswerke" (pension fund)?	<input type="checkbox"/> Receipt of payment and the respective contract documents for new contracts
Did you enter into any "Rürup-Vertrag" or "Riester-Vertrag"?	<input type="checkbox"/> Contract and payment documents, provider certificate as per § 10a EStG
Payments for legal and private health insurance and nursing care insurance, including children, life partner, spouse	<input type="checkbox"/> Certificate of the health insurance company
Accident and personal liability insurance, voluntarily contributions to unemployment and disability insurance, term life insurances	<input type="checkbox"/> Proof of payment
Endowment insurances obtained before 2005-01-01	<input type="checkbox"/> Proof of payment and respective documents for new contracts

### Exceptional financial Burdens

Does a lump sum for handicapped persons apply for you or your children?	<input type="checkbox"/> Certificate from the pension office or disability certificate
Did you take care of a helpless person during the assessment period?	<input type="checkbox"/> Certificate as previously for the person which you took care for
Were alimonies paid to grand parents, parents or children for whom you did not have a claim to child benefit?	<input type="checkbox"/> Proof of payments, proof for your incomes and incomes for those entitled to maintenance bilingual certificate of maintenance
Did any costs incur due to illness e.g. additional payments for dental treatment and dentures, fees for medical practice ("Praxisgebühr"), additional payments for cures, medication and helping means?	<input type="checkbox"/> Invoices, receipts, statements of the health insurance companies refunds from the health insurance companies are to be deducted
Did you have to pay for (a) funeral(s)?	<input type="checkbox"/> Certificate of death, all receipts, proof of the inheritance
All costs for civil procedures are to be considered (except for willful legal actions without prospects)	<input type="checkbox"/> Receipts from lawyers and other receipts

### Employment relationships of persons within your household, services and craftsman services

Did you employ a domestic aid?	<input type="checkbox"/> Certificate of the Deutsche Rentenversicherung Knappschaft-Bahn-See
Did you pay for care taking and/or care services or for services within your household?	<input type="checkbox"/> Invoices and account statements for these services, e.g. chimney sweeps, gardeners
Did you pay for craftsman services, which were done within your household?	<input type="checkbox"/> Invoices and account statements for any kind of craftsman services costs for garbage disposal are not supported For tenants: utility invoice

### Leasing

Enclosure V of your last income tax return (for new members)	<input type="checkbox"/>
Sales contract or deed of gift or deed of transfer	<input type="checkbox"/>
Please send address, year of construction and type of the real estate, possibly the floor plan	<input type="checkbox"/>
Notice of land acquisition, notary fees, costs of the court cashier	<input type="checkbox"/>
Interest certificate (banks, building societies) in case of mortgage loans	<input type="checkbox"/>
Certificate of the monument protection authority in case of a real estate which is protected as a monument	<input type="checkbox"/>
Notice of property tax	<input type="checkbox"/>
Construction invoice, invoice for repairs	<input type="checkbox"/>
Rental contract, property management's invoice for utilities of the apartment	<input type="checkbox"/>
In case of houses: utilities such as heating expenses, electricity, water, effluent water, garbage collection, home insurance etc.	<input type="checkbox"/>