

### Required documents for income tax return:

- **“Lohnsteuerbescheinigung” Annual wage and tax statement from dependent employment, this and the following documents also of your spouse**
- “Rentenbescheid” pension certificate
- **“Kapitaleinkünfte” German and foreign income from investments**
- Payslips from other countries for the time before or after the employment in Germany (salary statement) for the year of the tax declaration.
- **Proof of payments of pension insurance in other countries from the pension insurance institutions.**
- Documents regarding a change in marital status
- **“Lohnersatzleistungen“ e.g. Arbeitslosengeld, Krankengeld, Mutterschaftsgeld, Elterngeld etc.: Certificate about other received income compensation**
- birth certificate for children who were born in the tax year, or the civil registry record “Personenstandregister”
- **Please let us know if you did not receive the "Kindergeld" child benefit.**
- education certificates for children over the age of 18
- **child care costs (Kindergarten)**
- proof of charitable donations
- **Proof of insurance (e.g. health insurance; liability insurance; life insurance; accident insurance; legal protection insurance.). These will be valued according to your income**
- evidence about physical / mental disability
- **annual utility bill for your home (from the last year), bills of reparation works**
- **Proofs for exceptional costs like:**
  - Dental treatment; glasses
  - other medical expenses
  - funeral expenses
  - costs of divorce
  - etc.
- **Work related tax deductions**
  - distance to your workplace (one way)
  - labor union dues
  - proof from your employer about employment at different locations or driving work or business trips
  - proof from your employer about the necessity of a PC (also bought within the last 3 years), phone (phone bills) or other electrical devices, and any other required work equipment (e.g. bags, office equipment)
  - costs of further education (for yourself)
- income tax return assessment from the last year (if our office didn't do it)
- **Please give us a power of attorney to authorise our office with the Finanzamt. Both spouses need to sign our form for this. The power of attorney is valid until either you or our office withdraw the authority**
- **Double household:**
  - Employment contract
  - Proof of costs of double household:
    - rental contract and evidence of payment for the home in your native country
    - if you own a home (house, flat) in your native country, then bills of electricity or water costs, or comparable costs
    - rental contract for your home in Germany
    - payment of rent, electricity and utility costs in Germany
    - travel expenses (air fare costs etc.) to your native country
    - costs of home equipment (furniture, kitchen utensils etc.) in Germany
- **Support payments to family members (spouse in foreign country, parents, parents-in-law, grandparents)**

**Required proof for family living in a foreign country:**

- Maintenance declaration from your home country, original form
- Bank deposit form and confirmation of receipt or bank statements of cash withdrawals in your home country
- *support payments are credited from the month of the first transfer. (e.g. if in August, then you will receive payments for 5/12 months)*
- if you pay in cash, bank statements of cash withdrawals and travel evidence and the confirmation of receipt

**Required information for relatives living in Germany:**

- Declaration of support from the supported person
- Income of the supported person (evidence of pension income, unemployment benefits, social welfare etc.)
- Bank receipts for supported persons living in the same household aren't needed.
- Considering the income, up to 8,354.00 € of support payments for relatives can be declared

**If you have further questions, please contact us.**

**The fee for our office services depends on your income for the year.**

**►The tax declaration can be made retroactively for 4 years (in special cases, up to 10 years)**