

Documents relating to your income tax return

Please submit the following documents to your tax adviser for the preparation of your income tax return:

(Please delete where inapplicable!)

Dr. Michael Münch
 Steuerberatung
 Wirtschaftsberatung
 Gründungsberatung

Income from employment		
Required documents	Husband (Liable to tax)	Wife
Wage tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Capital-building payment schemes	<input type="checkbox"/>	<input type="checkbox"/>
Certificates about unemployment benefit, maternity benefit, parenting benefit, sickness benefit	<input type="checkbox"/>	<input type="checkbox"/>

Costs of earning income		
Tax-deductible expenses	Required documents	Attached
Commuting to and from work a) Own car	License plate number, working days per week, vacation days, travelling allowance, one-way distance to work Tickets	<input type="checkbox"/>
b) Public transport		
Drives for the firm by own car	Certificate from employer	<input type="checkbox"/>
Car accident (job-related)	Bill of damage paid by yourself	<input type="checkbox"/>
Employment at different sites (e.g. bricklayer, fitter)	Certificate from employer, List of activities (time and place)	<input type="checkbox"/>
Business trips	Certificate from employer, Travel expenses, List of business trips (time and place)	<input type="checkbox"/>

Union contribution	Receipt from union	<input type="checkbox"/>
Professional liability insurance	Insurance policy or proof of payment	<input type="checkbox"/>
Working clothes	Bills	<input type="checkbox"/>
Professional literature	Bills	<input type="checkbox"/>
Further education (e.g. training, language course)	Receipt of further education costs, Certificate from employer	<input type="checkbox"/>
Home office and equipment	Bills	<input type="checkbox"/>
Application expenses	Bills	<input type="checkbox"/>
Telephone and internet costs (job-related)	Telephone bill	<input type="checkbox"/>
Tax advice costs	Bills	<input type="checkbox"/>
Second Household (job-related)	Rental agreements, Billing of operating costs, List and evidence of journeys home (tickets, tank costs)	<input type="checkbox"/>
Moving expenses (job-related)	Bills	<input type="checkbox"/>

Personal expenses		
Tax-deductible expenses	Required documents	Attached
Insurances (e.g. life insurance, liability insurance, car insurance)	Insurance policy or proof of payment	<input type="checkbox"/>
Donations	Donation receipt	<input type="checkbox"/>
Subscriptions to political parties	Receipt from party	<input type="checkbox"/>
School fee	Receipt from school	<input type="checkbox"/>
Child care costs (e.g. nursery school, au pair)	Bills, proof of payments, contracts	<input type="checkbox"/>
Further education for non-practised profession	Receipt of further education costs	<input type="checkbox"/>

Extraordinary expenses		
Tax-deductible expenses	Required documents	Attached
Costs of divorce	Bills from lawyer and court	<input type="checkbox"/>
Health care expenses (e.g. dental prosthesis, glasses)	Bills	<input type="checkbox"/>
Funeral expenses	Bills	<input type="checkbox"/>
Relative's disability or care dependency	Disabled person's pass, Evidence of care level	<input type="checkbox"/>
Own disability or care dependency	Disabled person's pass, Evidence of care level	<input type="checkbox"/>
Support for relatives in need	Completed maintenance declaration (see enclosure) per person and per year with corresponding evi- dences,	<input type="checkbox"/>
	Proof of payments from bank (Please make sure, that the payments are credited to your relative's personal bank account and that the	<input type="checkbox"/>
External accommodation of children during professional education	Certificate of enrollment, Proof of external acomodation	<input type="checkbox"/>
Domestic employment	Period and description of employment, salary, wages tax card, contract	<input type="checkbox"/>
Domestic services (e.g. window cleaner, gardener)	Bills, proof of payment (from bank)	<input type="checkbox"/>
Craftsman's services (e.g. maintenance work, renovation work)	Bills, proof of payment (from bank)	<input type="checkbox"/>

Child

Required documents	Attached
Certificate of enrollment/articles of apprenticeship	<input type="checkbox"/>
Certificate of military service/ community service/ voluntary year of social service	<input type="checkbox"/>

Investment income		
Required documents	Husband (Liable to tax)	Wife
Tax statement for investment income	<input type="checkbox"/>	<input type="checkbox"/>
Annual tax certificate	<input type="checkbox"/>	<input type="checkbox"/>
List of tax allowable expenses concerning investment income	<input type="checkbox"/>	<input type="checkbox"/>

Income from pension		
Required documents	Husband (Liable to tax)	Wife
Pension approval certificate	<input type="checkbox"/>	<input type="checkbox"/>
List of tax allowable expenses concerning income from pension	<input type="checkbox"/>	<input type="checkbox"/>

Rental income	
Required documents	Attached
Rental agreements	<input type="checkbox"/>
Billing of heat, water, electricity etc.	<input type="checkbox"/>
List of tax allowable expenses concerning renting	<input type="checkbox"/>

Other income		
Required documents	Husband (Liable to tax)	Wife
Proof of income from speculative transactions	<input type="checkbox"/>	<input type="checkbox"/>
Income from other shares	<input type="checkbox"/>	<input type="checkbox"/>
Proof of paid alimony	<input type="checkbox"/>	<input type="checkbox"/>