

The [Lohnsteuerhilfverein Imposta e.V.](#) prepares tax statements for its members and helps year-round on any question or problem regarding tax issues.

This checklist helps when preparing documents for a consultation. Here you can find some of the documents, certificates etc. that you need to take with you. This are only the essential documents, there is no substitute for a consultation in our office.

### ***General Information:***

- Personal ID
- Tax identification number
- Tax statement/assessment from the previous year
- Banc account information (IBAN)
- Proof of wage-replacement benefits (e.g. sickness benefit, unemployment benefit, parental benefit...)
- Proof of capital-forming benefits
- Application for housing subsidy
- Annual certificate of capital income (e.g. interest, dividends etc...)
- Proof of foreign earnings

### ***Information about your children:***

- Tax identification number
- Childcare costs (banc account statement, contract...)
- Costs relating to education (proof of school/university attendance, school/study fees, BAföG etc...)

### ***Professional expenses:***

- Application costs
- Costs to the primary place of work
- Moving costs
- Home-Office proof (number of working days)
- Costs for work equipment
- Proof of running two households (the second one is for work-related reasons)

### ***Retirement related documents:***

- Pension receipt notification from the statutory pension
- Income tax statement
- Other pensions (e.g. private pension...)

### ***Special expenses:***

- Insurance contribution (e.g. private medical, nursing care, accident...)
- Private pension (e.g. Riester, Rürüp...)
- Donation receipts

### ***Other tax reductions:***

- Healthcare costs (e.g. doctor's fees, medication, dentist, glasses, medical treatment, travel costs to treatment/doctor...)
- Funeral costs
- Occupational impairment and its percentage (e.g. disability card...)

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