



**FRANK, FOLLERT
UND LOCZENSKI**
Steuern • Bilanzen

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Checklist

German income tax return

Fiscal: VAZ 2021

Nr.	General	enclosed	open	not relevant
01	Tax ID / German tax number			
02	Tax assessment last year			
03	Bank account / IBAN / BIC (for refund)			

Nr.	Proof of income	enclosed	open	not relevant
04	Wage and tax statement from your employer			
05	Unemployment benefits received; alternatively, notice of granting			
06	Other wage-replacement benefits: sick pay / maternity pay parental allowance, transitional allowance, compensation for lost wages due to insolvency			
07	Severance pay, severance agreement			
08	Notices of the amount of retirement benefits / retirement benefits adjustment notices / retirement benefit payment notices			
09	Rental and lease income - rental contracts			
10	Tax certificates and income statements concerning interest income.			

Nr.	Employment expenses	enclosed	open	not relevant
11	Commuting costs, proof of distance traveled in kilometers (one way)			
12	Contributions to professional associations (unions)			
13	Receipts for work materials / work clothing			
14	Workroom / study expenses			
15	Travel costs (employer certificate, reimbursement)			
16	Professional development expenses (e.g. master craftsman or business administrator)			
17	Application expenses			
18	Double housekeeping (secondary residence contract and proof of payment)			
19	Accounting and tax consulting expenses			

Nr.	Advertising expenses for renting a living space	enclosed	open	not relevant
20	Loan interest / bank certificates			
21	For new real estate: purchase contract, commission fees, conveyance fees, property transfer tax			
22	Notary costs			
23	Construction and repair invoices, management fees			
24	Property tax, water charges, wastewater charges, electricity fees, refuse collection fees, operating costs for heating			
25	maintenance, fuel, itemization of ancillary costs (Condominium Act)			
26	Ancillary cost settlement with tenant			

Nr.	Extraordinary burden	enclosed	open	not relevant
27	Health costs (practice fees, dentures, glasses, treatment costs, non-medical practitioners, travel costs to doctors, hospitals, pharmacies, etc.)			
28	Burial costs			
29	Financial support for family members (proof of payment, proof of own income, salaries and assets of supported persons and divorcees)			
30	Help at home (proof of illness, need for care, disability)			
31	Personal identification for disabled persons			
32	Proof of level of care			
33	Legal costs (divorce, other)			

Nr.	Other documents worth submitting	enclosed	open	not relevant
34	Craftsman services (e.g. chimney sweeps, electricians, window fitters), invoices and proof of payment / bank statements are required			
35	Household-related services (e.g. gardening work, home help, nursing services)			
36	for mini-jobs – Knappschaft certificate			
37	Ancillary cost statement from housing management / landlord			
38	Certificate concerning contributions to capital formation			
39	In the event of changes to family status: birth certificates, marriage certificates, death certificates			

Nr.	Children	enclosed	open	not relevant
40	Childcare costs (contract, invoice, proof of payment)			
41	Training certificate, evidence of enrollment, certificate of study			
42	Voluntary service certificate			
43	Tuition paid for preferential schools (evidence of enrollment)			
44	Health insurance and long-term care insurance contributions for children with private coverage			



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