



Checklist

German income tax return

Fiscal: 2024 / 2025

Nr.	General	Enclosed	Open	Not relevant
01	Tax ID / German tax number			
02	Tax assessment last year (for new clients)			
03	Bank account / IBAN / BIC (for refund)			

	Proof of income	Enclosed	Open	Not relevant
04	Wage and tax statement from your employer			
05	Unemployment benefits received; alternatively, notice of granting			
06	Coronavirus subsidies/emergency aid/bridging funds Additional payments or refunds based on the final settlement of coronavirus aid			
07	Other wage replacement benefits: Sick pay/maternity pay, parental allowance, transitional allowance, insolvency compensation			
08	Pension notices / pension adjustment notices / pension payment notices			
09	Income from rental (statement of basic rent and operating costs), current rental agreement if applicable)			
10	Tax certificates and statements of income from interest and other capital gains			

	Advertising costs from employment	Enclosed	Open	Not relevant
11	Information on the number and mileage of journeys between home and place of work, list of work-related journeys and mileage			
12	Contributions to professional associations (trade unions)			
13	Receipts/invoices for work equipment/work clothing			
14	Expenses for a study or details of home office days			
15	Costs of home office equipment (office furniture, computer, printer, other office expenses)			
16	Expenses for professional training (e.g. to become a master craftsman or business administrator)			
17	application costs			
18	Double household (rental agreement for second home and proof of payment)			
19	tax consultancy costs			

	Advertising costs for renting residential property	Enclosed	Open	Not relevant
20	Loan interest / Bank statements			
21	For new properties: purchase agreement, estate agent's fee, transfer fee, land transfer tax			
22	notary fees			
23	Construction and repair invoices, administrator invoices			
24	Property tax, water, sewage, electricity, waste disposal fees, heating operating costs			
25	Maintenance, heating costs, list of ancillary costs			

	Extraordinary expenses	Enclosed	Open	Not relevant
26	Medical expenses (doctor's fees, dental prostheses, glasses, spa treatments, alternative practitioners, travel costs to the doctor, hospital, pharmacy, etc.)			
27	Funeral expenses (if not covered by the estate)			
28	Maintenance payments to relatives (proof of transfers to the recipient's account, income and assets of the persons receiving support and divorced persons)			
29	Help with household chores (proof of illness, need for care, disability)			
30	severe disability card			
31	Proof of care level			

	Tradesmen/household services	Enclosed	Open	Not relevant
32	Craftsmen's services (e.g. chimney sweep, electrician, window fitter, invoice and proof of payment/bank statement required)			
33	Energy-efficient renovation (invoices, certificate from the service provider/specialist company)			
34	Household-related services (e.g. gardening, domestic help, care services)			
35	For mini-jobs – certificate from the miners' social insurance fund			
36	Service charge statement from the property management company/landlord			
37	Certificate of capital-forming payments			

	Children	Enclosed	Open	Not relevant
38	Childcare costs (contract, invoice, proof of payment)			
39	Training, school or study certificate			
40	Certificate of voluntary service			
41	School fees paid for beneficiary schools (school certificate)			
42	Health and nursing care insurance contributions for privately insured children			

	extraordinary expenses	Enclosed	Open	Not relevant
43	Insurance expenses (health and nursing care, disability, accident, life and pension insurance, liability and motor vehicle liability insurance)			
44	Certificates for private pension provision (Riester pension / Rürup, certified basic pensions)			
45	Donations/tax-deductible contributions to political parties or membership fees			
46	Costs for own vocational training (certificate of attendance, invoice for participation fee, travel expenses, accommodation costs)			