

Bring with you on your first visit

- Tax assessment notice for the previous year
- If available, the advance payment notice
- Valid identity card / passport
- Tax consultancy fees, e.g. from the previous year

Income

- Income tax certificate(s) (also company pension and pensions)
- Pension notification or pension adjustment notification from the statutory pension insurance, e.g. old-age, widow(er)'s, orphan's, disability pension, etc, orphans, disability pension
- Proof of payment of other pensions, e.g. ZVK, VBL, insurance pension, foreign pensions
- Proof of wage replacement benefits e.g. unemployment benefit, maternity benefit, insolvency benefit, sickness benefit, ALG II (Hartz IV), parental allowance
- Foreign income
- Maintenance payments received from ex-partner
- Income from private sales transactions, e.g. property sales, cryptocurrency trading
- Rented property e.g. rental agreements, property management statements, interest on debt, Service charge statements with the tenant
- Certificates of investment income (interest) Tax certificates for withholding tax withheld
- Income/expenditure from training activities or voluntary work

Proof for your children

- Tax identification number
- Childcare costs (contract, bank statement or notification)
- Proof of education e.g. school/study certificate, apprenticeship contract, BAföG
- School fees certificate

Employment expenses

- Business trips, external activities (employer's certificate if applicable)
- Expenses for double housekeeping e.g. rent, ancillary rental costs, both households
- Job application costs
- Job-related relocation costs (if travelling time is reduced by 1 hour/one-way)
- Own costs for further education, training e.g. course fees, travelling expenses, costs for master craftsman's examination or for studies
- Study if no workplace is available at the employer => all Proof of costs (e.g. rent + utilities)
- Expenses for work equipment, e.g. specialist literature, tools, computer, work clothes

- Contributions to professional associations
- Work-related legal expenses insurance
- Expenses for work-related coaching

Special expenses

- al expenses Insurance contributions, -Annual certificate of the contributions submitted for private health and long-term care insurance other insurances, e.g. liability, accident, life, pension insurance
- Proof of donations
- Maintenance payments, e.g. to the ex-spouse
- Private pension scheme, -Riester pension (certificate according to §92 EstG),
-Certificate of the contributions transferred to the basic pension

Tradesman's wage costs/extraordinary burdens

- Household-related services in your own household, e.g. costs for caretaker, winter maintenance, garden maintenance (only labour costs deductible, no cash payment) against invoice + account statement as well as costs for domestic help, emergency call-out service
- Service charge settlement of the landlord
- Support for the needy
- Medical expenses e.g. doctor's fees, medication, dentist, glasses, costs for spa and medical treatment, hospitalisation, travel costs to doctors, care costs
- Funeral costs, if no estate is available
- Proof of degree of disability, degree of care, e.g. certificate or ID of physical disability or pension certificate for accident pension (also for children)

Other supporting documents

- Bank details (IBAN)
- Proof of capital-forming benefits
- Application for housing subsidy
- Assessment notices, e.g. loss assessment notice, proof of investment income from letting