

## Checklist Lexo.Tax -Lohnsteuerhilfverein- - Income Tax Assistance Association

### General:

- ID card
- Tax identification number
- Tax assessment from the previous year
- Proof of change in marital status (e.g., marriage certificate)
- Wage tax certificates
- Proof of wage replacement benefits (e.g., unemployment benefits, short-time work benefits, sick pay, parental leave benefits, maternity benefits, insolvency benefits, etc.)
- Documentation of capital-building benefits
- Application for housing construction premium
- Documentation of household-related services in your own household
- Proof of craftsman services in your own household (invoices and payment receipts)
- Annual certificates of capital gains (e.g., interest, dividends, etc.)
- Documentation related to rented properties (e.g., acquisition costs, loan interest, rental agreements, service charge statements, house money statements, etc.)
- Proof of income from private sales transactions (e.g., real estate sales, etc.)
- Proof of foreign income
- Service charge statement for the rental agreement
- Proof of energy-saving measures

### Documents related to children:

- Tax identification number(s) of child(ren)
- Birth certificate(s)
- Proof of childcare costs
- Proof of search for a training place
- Documentation related to education (e.g., training contract and wage tax certificate or proof of school or university attendance, school or tuition fees, BAföG, etc.)

#### Work-related expenses:

- Proof of application costs
- Proof of travel expenses to the first place of work
- Proof of workdays
- Proof of job-related relocation costs
- Proof of costs for double housekeeping (second home for work reasons)
- Proof of costs for a home office
- Proof of costs for business trips and off-site activities
- Proof of costs for work equipment (e.g., work clothes, professional literature, tools, etc.)
- Proof of training and further education costs
- Receipts for contributions to professional associations/unions
- Proof of costs for tax advice

#### Special expenses:

- Proof of insurance contributions (e.g., private health, long-term care, accident, liability, pension, and life insurance, etc.)
- Proof of private pension plans (e.g., documents on Riestert and Rürup pensions, etc.)
- Donation receipts or payment proofs for donations up to 300 euros

#### Extraordinary burdens:

- Proof of maintenance payments to dependent relatives
- Proof of medical and care costs (e.g., medical and dental services, hospital stays, medications, glasses, cures, medical treatments, care and retirement homes, travel to doctors, etc.)
- Proof of disability or care level (e.g., disability ID card)
- Proof of funeral costs (if not covered by the estate)