

# Checklist for VLH consultation

The Vereinigte Lohnsteuerhilfe e. V. (VLH) tax advisory service prepares tax statements for its members, and offers year-round advice on any tax issues.

This checklist is a great help when preparing for a VLH consultation. It shows you which documents, certificates etc. you may need to bring with you. In certain cases further proof may be required to reduce your tax obligations. VLH consultants will discover this together with members.

## General

- ID card
- Tax ID number
- Previous year's tax statement
- Proof of change in family circumstances e.g. marriage certificate
- Employment tax statements
- Proof of wage-replacement benefits e.g. unemployment benefit, type II unemployment benefit (Hartz IV), sick pay, parental benefit, maternity benefit, insolvency benefit etc.
- Proof of capital-forming benefits
- Application for housing subsidy
- Proof of household services carried out in your own household
- Proof of manual work carried out in your own household
- Annual certificates of capital income e.g. interest, dividends etc.
- Documents related to rented property e.g. acquisition costs, mortgage interest rates, leases, ancillary cost settlements, maintenance costs etc.
- Proof of income from private sales transactions e.g. property sales etc.
- Proof of foreign earnings

## Proof relating to any children

- Child's/children's tax ID number(s)
- Birth certificate(s)
- Proof of childcare costs
- Proof of search for education/training placements
- Proof relating to education e.g. training contract and tax statement or proof of school or university attendance, school or study fees, BAföG student loans etc.

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## Proof relating to retirement

- Pension statement, benefit statement or pension indexing statement e.g. for old-age pension, survivors' benefit, disability benefit etc.
- Tax statements e.g. for personal or company pension etc.
- Proof of further pensions

## Application costs

- Proof of application costs
- Proof of travel costs to the workplace
- Proof of relocation costs (for work-related relocations)
- Proof of costs of running two households (when a second home is necessary for work-related reasons)
- Proof of office costs
- Proof of costs for business travel and external activities
- Proof of costs for work equipment e.g. work clothes, professional literature, tools, computers, smart phones etc.
- Proof of education and training costs
- Proof of fees for membership of professional associations/trade unions
- Proof of costs for tax advice

## Miscellaneous expenses

- Proof of insurance contributions e.g. for private medical, nursing care, accident, liability, pension and/or life insurance etc.
- Proof of private pensions e.g. documents relating to Riester and/or Rürup pensions etc.
- Receipts for donations

## Exceptional costs

- Proof of maintenance payments to dependents
- Proof of costs relating to illness and medical treatment e.g. for doctor's and dentist's services, hospital stays, medication, prescription glasses, treatments and cures, nursing and retirements homes, trips to the doctor etc.
- Evidence of degree of disability or degree of required care, e.g. disability card
- Proof of burial costs

### VLH in your area: