

Tax return checklist

- Personal details**
 - Names (Husband/Wife /Partner 1/Partner 2 / Children), address with postcode and place of residence
 - Dates of birth
 - Occupation(s)
 - Religion
 - School/training of children from ... until ... at ...
 - Maintenance to/from former partner/children, child support advance payments
- Income**
 - Salary certificate (full-/part-time occupations)
 - Pension statement, daily benefit slips, etc
 - Records of any self-employed work
 - Other income
- Securities**
 - Balances of and interest statements for your accounts (Bank/Post Office)
 - Tax statement of your safekeeping account or statements of the purchase/sale/yield of securities
 - Lottery winnings
 - Documentation of qualified (min. 10%) holdings (half rate method)
- Property**
 - Rental value and net asset tax value (documentation!)
 - Rent received (if applicable)
 - Schedule of and receipts for maintenance costs
- Assets**
 - Confirmation of surrender value of life assurance policies
 - Cars: Brand, year of acquisition, purchase price
 - Gifts / Potentially-exempt transfers / Inheritances
 - Lump-sum benefits in 2016
- Professional expenses**
 - Season tickets for public transport
 - ? km x ? journeys per day (if car/motorcycle allowable)
 - Receipts for disbursements for continuing professional development (CPD)
 - If applicable (home office): Number of rooms in your dwelling/house plus the monthly rent
- Debts**
 - Bank/credit card statements (debit balance and interest)
 - Loan statements (agreement, debit balance and interest)
- Insurance/pension**
 - Health insurance premiums for all members of the family for 2016
 - Confirmation of contributions to the 2nd and 3rd pension pillars

- Miscellaneous deductions**
- Asset management costs (securities!)
 - Contributions to political parties
 - Contributions to charities
 - Healthcare/accident/dental/optician's/acoustician's charges paid privately (only with medical certificates)
 - Any costs arising from disability
 - Outside care for children born between 2002 and 2016 inclusive
- Remember**
- Your tax return (1st page)
 - Your tax return for the previous year (if you are using us for the first time)