

Checklist for your VLH consultation

Lohnsteuerhilfverein 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 and your VLH advisor will inform you during your consultation.



General information

- ☐ Personal ID
- ☐ Tax identification number
- ☐ Previous year's tax statement
- ☐ Proof of change in family circumstances e.g. marriage certificate
- ☐ Income tax statements
- ☐ Proof of wage-replacement benefits, e.g. unemployment benefit, short-time allowance, sickness benefit, parental benefit, maternity benefit, insolvency payments, 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 (invoices and proof payment)
- ☐ 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
- ☐ Service charge invoice to the rental agreement
- ☐ Proof of energy-related construction measures

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 relation to retirement

- ☐ Pension receipt notification from the statutory pension scheme, e.g. for retirement pension, surviving dependant's pension or reduced earning capacity pension, etc.
- ☐ Income tax statements, e.g. for civil service or company pensions, etc.
- ☐ Proof of further pensions, e.g. private pension, benefits statement for company pension scheme, etc.

Application costs

- ☐ Proof of application costs
- ☐ Proof of travel costs to the primary place of work
- ☐ Proof of days worked
- ☐ Proof of work-related moving expenses
- ☐ Proof of costs of running two households (second home is necessary for work-related reasons)
- ☐ Proof of office costs
- ☐ Proof of working from home
- ☐ Proof of costs for business travel and external activities
- ☐ Proof of costs for work equipment e.g. work clothes, professional literature, tools, 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 payments e.g. 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.
- ☐ Donation receipts or proof of payment for donations up to EUR 300

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.
- ☐ Proof of occupational impairment and its severity e.g. disability card
- ☐ Proof of funeral expenses (if not covered by the estate)

Your VLH Advice Centre:

Please
bring all
documents to the
appointment.