

## LIST of Documents & Information needed for the tax declaration

### General Documents

- Tax forms received from the tax office
- A copy of last year's tax assessment (if we are preparing your tax return for the first time)

### Personal details

- Personal details of all family members (surname, family name, dates of birth, marital status, religious denomination, occupation, employer, place of work, school/training of children from ... until .... at ....)
- If you have moved during the tax year, indicate relocation date as well as the old and new address

### Income from employment, pensions or insurance, self-employment

- Wage statement („Lohnausweis“) received from the employer and/or confirmation of pensions received
- Statement of unemployment or insurance benefits received
- Receipts of costs for further education or retraining, if not paid by the employer
- Profit & loss statement for self-employment activity

### Voluntary pension plan contributions

- Official confirmation from the bank or insurance company, **if** you have made contributions to a tied private pension plan (pillar 3a)
- Official confirmation from the pension company, **if** you have made voluntary contributions to the professional pension scheme for missing contribution years (pillar 2)

### Bank accounts and securities & Credit cards / Debts (other than mortgage)

- Statements for all bank accounts that you have (worldwide), showing the balance at the end of the year and the interest received in the tax period
- Statement for any securities (shares, bonds...) that you have, showing the value at the end of the year and the distributions received in the tax period, as well as details of purchases and sales of securities in the tax period
- Statements of cryptocurrencies (wallet print as of the end of the year)
- Statement for credit cards that you have, showing the balance at the end of the year and the interest paid in the tax period (not applicable if you pay off the credit card balance each month)
- Statement for private debt loan, showing the balance at the end of the year and the interest paid in the tax period

### Real estate property & mortgages

- Purchase price / foreign tax value / estimate of current market value
- Address of the property, years of purchase and construction
- Summary of rent received in the tax year (if rented out) // If owner-occupied: estimate of rent that you could get
- Statement for any mortgages, showing the amount due at the end of the year and the mortgage interest paid
- Receipts / invoices for maintenance cost of the property & insurance paid for the property

### Other assets

- Indication on surrender value life insurance contracts (= for life insurance policies with a savings portion)
- Cars (brand, year of manufacture, purchase price)

### Varia

- Summary of health insurance premiums paid
- Documentation on medical/dental treatment costs not covered by the health insurance
- Inheritance, usufruct or considerable gifts received in the tax year
- Contribution to charities or political parties
- Copy of invoice(s) for external childcare
- Documents regarding alimonies paid or received