

# 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 2017
- 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 2017
  - 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 2003 and 2017 inclusive
- Remember**
- Your tax return (1st page)
  - Your tax return for the previous year (if you are using us for the first time)