



TAX
BOUTIQUE

by Julia David & Edda Vocke

INCOME TAX RETURN 2025

Client Checklist

All documents for your tax return – complete and structured

So that we can process your income tax return quickly and in full, please tick every item that applies to you and provide us with the relevant documents. This helps us avoid follow-up questions and saves valuable time.

HOW TO USE THIS CHECKLIST

Complete in one go – not piece by piece.

Go through the sections below and tick every item where documents are available or relevant. Not every point applies to everyone – when in doubt, simply keep it ready in case we have questions.

I. Personal Information

Tax ID number (Steuer-ID)

Current address

Marital status (incl. changes during 2025)

Bank details (IBAN)

Religious affiliation

Children: date of birth, child benefit, education/study status

2. Income from Employment (§ 19 EStG)

Wage tax statement(s) 2025

Wage replacement benefits (e.g. sick pay, parental allowance, unemployment benefit)

Travel expenses / employer reimbursements

Proof of maintaining a second household (double household)

Home office days / home study

3. Income-Related Expenses

Commute home–workplace (distance + days)

Work equipment (laptop, furniture, professional literature)

Training and further education costs

Job application costs

Professional associations / trade unions

Telephone and internet costs (proportional)

Work-related relocations

4. Income from Self-Employment (§ 18 EStG)

Income surplus statement (EÜR) 2025

Trial balance / DATEV reports

Asset register / depreciation (AfA)

Investment deduction amounts (§ 7g EStG)

Private-use shares (e.g. car, telephone)

5. Income from Trade or Business (§ 15 EStG)

Annual financial statements or EÜR

Trade tax assessment

Participations / special business assets

6. Income from Renting and Leasing (§ 21 EStG)

Rental agreements

Service charge statements

Loan agreements and interest certificates

Property management statements (Hausgeld)

Maintenance and repair costs

Purchase agreement, notary fees, real estate transfer tax

Depreciation basis (AfA)

7. Investment Income (§ 20 EStG)

Tax certificates from banks

Withholding tax certificates (investment income)

Foreign investment income

Capital gains (shares, funds, cryptocurrencies)

8. Other Income (§ 22 EStG)

Pension statements (statutory, private, professional pension scheme)

Pension adjustment notices

Maintenance / alimony payments

Private sale transactions

9. Special Expenses

Health and long-term care insurance contributions

Retirement provision contributions (Rürup, Riester, professional pension scheme)

Church tax

Donation receipts

School fees

Maintenance / alimony payments

10. Extraordinary Burdens (§ 33 EStG)

Medical costs

Care costs

Degree of disability / severe disability ID

Funeral costs

Support for dependants in need

II. Tax Reductions (§ 35a EStG)

Skilled trade services (invoice + non-cash payment)

Household-related services

Household-related employment

12. Other Documents

- Tax assessment previous year
- Advance payment notices
- Tax consultancy costs
- Changes compared to the previous year

Notes for clients

- › Please submit all documents digitally and in a structured form where possible.
- › Tax reductions under § 35a EStG are only possible with non-cash payment.
- › Wage replacement benefits are subject to the progression clause and increase the tax rate.
- › Please actively inform us of significant changes (e.g. marriage, property purchase, self-employment).
- › **Filing deadline with tax representation: 1 March 2027**

YOUR NEXT STEP

Questions about your tax return?

Just let us know – we will check which documents are genuinely relevant in your case and guide you safely through the filing.

[Get in touch now](#)

Personally with Julia David or Edda Vocke · Fast response · Via Teams or in person in Frankfurt