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for easy completion of the document

Who recommended us? (Last name, First name) / Coupon code

Male

Female

Tax year:

## Personal data

Information: After the initial registration, only amendments need to be submitted in following years and attach supporting documents that we don't have yet.

Last name

First name

Date of birth

Religious affiliation

Date of leaving

Nationality

Job

Married since

Separated since

Divorced since

widowed since

Street, Number

Post code, City

Resident since

Did you have more than one residence during the tax year?

If yes, date of move

yes (please add list if appropriate)

no

Different address during the tax year: Street

Post code, City

Phone number

Mobile

Email address

Tax identification number



Spouse's last name (may be different)

Spouse's first name

Date of birth

Religious affiliation

Date of leaving

Different address during the tax year: Street

Post code, City

Occupation

Tax identification number



## Bank details

IBAN

# Tax return

Information: Some documents will be accessed using Elster. Please only send us the documents listed here.  
If you are unable to answer a question, just leave that field empty.

Attach a one-off complete copy/photograph of government identification card or passport or other valid form of identification (front and back).

Did you not file your last tax return through Lohnlotse?      no      yes:      (year)  
(Attach copy of last tax statement with all front and back sides and tax return.)

Who compiled your tax return?      Myself  
Income tax assistance association / tax consultant  
Lohnlotse  
I have never compiled a tax return

Have you made any advance payments to the tax office?      yes (please include your preliminary income assessment)  
no

## Insurances

Do you have private health insurance?      yes  
no

Have you taken out a Riester pension?      yes  
no

Have you taken out a Rürup or basic pension?      yes  
no


## Other Expenses

If necessary add Attachment U:  
[www.llotse.de/downloads](http://www.llotse.de/downloads)

Do you pay your divorced / permanently separated spouse alimony? (Does not include child support)      yes: to what amount?      €  
no      (Total year contribution)

Do you pay child maintenance (only relevant if you do not receive child benefit or tax exemption for dependent children)?      yes: to what amount?      €  
no      (Total year contribution)

Annual income for the child      €  
no

Have you donated to a non-profit charity organisation or voter's association?      yes: please include documentation (bank account statement or donation receipt)   
no

Do you have a disability?      yes: please include your disability card  
no

Did costs for medical expenses occur (e.g. practice fees, supplementary payments, invoices for private medical treatment, medicine)?

yes: Please enter the total amount (please only include documentation on request)

Expenses

Refunds

no

Transport to doctors / hospitals?

yes: Please include a list of transport (date, city, kilometres travelled)

no

Did you have any other "exceptional costs" (e.g. funeral costs, ...)?

yes: please include documentation

no

Do you support dependants financially or personally in their own household (life partner, parents, children (in general from the age of 25 there is no claim to child benefit or tax exemption for dependent children) or dependants abroad? Please attach payment documents and proof of income of the supported person if necessary.

yes:

Relative's name

Street, Number

Annex U can be downloaded here:  
[www.llotse.de/downloads](http://www.llotse.de/downloads)

Post code, City



Maintenance Declaration

Occupation

Date of birth

Income in €

Tax ID

no

Did you care for a constantly helpless person without reimbursement?

yes: Please include a disability card or proof of level of care

no

Did household related costs, costs for tradesmen's services or similar (e.g. costs for nursing / care, painters, window cleaners, repairs, chimney sweeps, heating maintenance, household help, pest control, etc.) occur?

yes: Please include invoice and bank statement (cash payments for tradesmen's invoices are not allowed)

no



**Information: Please note that labour costs must be shown separately on tradesmen's invoices!**

Were there expenses for listed buildings used for own residential purposes and buildings in redevelopment areas and urban development areas?

yes: Please include proof. A corresponding certificate can be downloaded:

[www.llotse.de/downloads](http://www.llotse.de/downloads)

no

Were there expenditures for energy-related measures (thermal insulation, replacement of windows, exterior doors, heating, ventilation system, installation of digital systems for optimising energy operation and consumption, and optimisation of existing heating systems if they are more than two years old)?

yes: Please include proof. A corresponding certificate can be downloaded:

[www.llotse.de/downloads](http://www.llotse.de/downloads)

no

Translated with [www.DeepL.com/Translator](http://www.DeepL.com/Translator) (free version)

yes: please include documentation

no



# Income from Employment

Were you employed?

yes, please include your employment tax notification (for both spouses, if appropriate)



Germany

abroad

no

Did you receive wage-replacement benefits (e.g. sickness, maternity, parental or unemployment benefits)?

yes (include assesment)

no

## INCOME RELATED EXPENSES (TAXPAYER):

Travel costs for public transport between home and work (also job ticket):

Working days per week

### Costs for travel between home and workplace

**These journeys are made with a car of one's own or a car provided for use**

(Please also fill in if you use public transport or company car)

Period (from ... to)	Place of departure (address)	Deployment location (address)	km one-way

I had more than three employers in a tax year. Please fill in the free text field on page 14.

Holiday/sick days:

## INCOME RELATED EXPENSES (SPOUSE):

Travel costs for public transport between home and work (also job ticket):

Working days per week

### Costs for travel between home and workplace

**These journeys are made with a car of one's own or a car provided for use**

(Please also fill in if you use public transport or company car)

Period (from ... to)	Place of departure (address)	Deployment location (address)	km one-way

I had more than three employers in a tax year. Please fill in the free text field on page 14.

Holiday/sick days:

# Other Income Related Costs

Did you use personal means of telecommunication (land line/internet/mobile) for work?

- Land line/internet:

- Mobile:

Have you, either full-time or part-time, worked from home (using a home office)?

*(e.g. also during professional training, further training and continued training, management of own tenancies, trade activity, freelance work, operation of a solar power system)?*

**Info: The home office must be a separate room. Not a corner office in a living room or in your bedroom.**

Did you run two households?

Did costs occur for work-related relocation  
*(e.g. including a reduction in travel time of more than one hour)?*

Did expenses occur for job applications?

Did costs occur for lawyers and proceedings that were work-related?

Did you have costs to restore health?  
*Here we are talking about typical occupational diseases. Because then, for example, expenses for back training and neck massages can also be recognised by the tax office.*

Have you incurred expenses for professional training, further training and continued training or studies?

yes: Please include employer statement We provide sample statements on request:  
[www.llotse.de/downloads](http://www.llotse.de/downloads)

Please list the amounts of three consecutive months (e.g. May 29.00 €, June 35.59 €, July 40.00 €)

Please list the amounts of three consecutive months (e.g. May 33.00 €, June 39.95 €, July 41.00 €)

no

yes: Attach sketch of residence and home office (example sketches can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)), stating the size of the home office, total surface area of residence, rent and all proofs of costs (running costs, notary, property tax, deed of purchase, estate agent, interest on loan etc.). The annex and certificates for the home office can be downloaded:

[www.llotse.de/downloads](http://www.llotse.de/downloads)

no

yes: Please include rental agreements for both households, proof of costs as for office (for this it is necessary for your own household to be located at the focal point in your life). The "Two Households" annex can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)

no

yes: Please include proof of payment (double rent, purchase of a stove, heating units), list of travel during relocation and house hunting. The "Moving Costs" annex can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)

no

yes: Attach preparation seminar (e.g. for German Aerospace Center (DLR) test, simulator for screening), type rating costs, Xing fees or similar portals etc. The "Application Expenses" annex can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)

no

yes: Please include proof. Attach proofs. The "Litigation Costs" annex can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)

no

yes: please include documentation

no

yes: Attach proofs, statements of participation fees, semester contributions, accommodation, study groups, journeys, work material, specialist literature, interest payments for student loans etc. The "Further Training Costs" annex can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)

[www.llotse.de/downloads](http://www.llotse.de/downloads)

no

Have you exercised external activity  
(e.g. working across many places of work or no primary place  
of work, including for personnel agency/temporary  
employment)?

yes: Attach a list of journeys executed and daily periods  
of absence and, if necessary, an employer's certificate  
stating the number of and daily absence periods for the  
external activities . A template table for journeys and a  
certificate for external activities can be downloaded:  
[www.llotse.de/downloads](http://www.llotse.de/downloads)

no

Have you had a temporary work contract or was the set  
period for your job under 48 months (4 years)?

yes: Attach work contract, attach written agreement.

no

Have you incurred tax accountancy costs?

yes: Attach proofs for tax adviser, income tax assistance  
associations, tax literature and software  
(Lohnlotse invoices are available to us)

no

Have you incurred entertainment expenses due to work?  
(e.g. also job starting, leaving and anniversary celebrations)

yes: Attach entertainment receipt, stating the occasion  
and the names of the participants

no

Are you a member of a union / professional association  
(e.g. IGM, Verdi, UFO, etc.)?

yes: please include proof of payment for union  
fees/ professional association fees

no



Did you purchase work equipment  
(e.g. computer, mobile phone, office supplies, professional  
literature, work wear, luggage / flight kit)?

yes: please include documentation (A template employer  
statement can be downloaded:  
[www.llotse.de/downloads](http://www.llotse.de/downloads))

no, please add the annual tax deductible amount for  
work-related costs of 110 €

Do you have any of the following: legal expense insuran-  
ce for labour law, professional liability insurance, casualty  
insurance, loss-of-license insurance, overseas health  
insurance?

yes: please include documentation

no

Have you invested capital-forming payments  
(e.g. home loan and savings contract, stocks and bond  
savings contract)?

yes: please include a capital-forming payment statement  
(available at your investment bank). (from 2017 onwards,  
statements will no longer be issued)

no

Have you used a company vehicle over a long period of  
time?

yes: Attach proof of expenses for private travel (e.g. fuel  
costs etc.) if they are not assumed by the employer

no

Have the journeys made to the primary place of work  
using the company vehicle been taxed with the 0.03%  
supplement and did the employee drive there on less  
than 15 days per month?

yes: Attach a list of the days (stating the date) on which  
you actually used the company vehicle for journeys  
between your residence and the primary place of work  
and the payslips that show taxation with the 0.03%  
supplement.

no

Have work-related expenses been deducted from your  
salary (e.g. costs for uniform, work material, seminar  
costs etc.)?

yes: Please attach the relevant payslips

no

Have you had unusual vehicle costs (on the way to  
work)?

yes: Attach proofs for accident costs, costs for replacement  
engine, costs due to theft (if not reimbursed by insurance).  
The "Accident Costs" annex can be downloaded:  
[www.llotse.de/downloads](http://www.llotse.de/downloads)

no

Have you incurred postage costs due to work?

yes: Enter total amount (provide proofs only upon request)

no

Have you incurred costs for occupational medical examinations?

yes: please attach proofs

no

Further tax-relevant information for professional expenses

## Other Income

### INVESTMENT INCOME

Do you have income from capital assets?

yes. Please include the tax statement issued by the bank (for investment income over 801 € if single / 1,602 € if married)



yes, I have an exemption order (My investment income is below 801 € if single / 1,602 € if married)

no, I do not have investment income

Do you receive investment income from abroad?

yes

no, I do not receive investment income from abroad

Banking Institution

Banking Institution

Banking Institution	Banking Institution

I have been advised that not declaring investment income corresponds to tax evasion and Lohnlotse e.V. is not responsible for any consequences thereof.

Do you receive foreign income or do you live abroad?

yes: Attach EU/EEA certification and, if required, application for unrestricted tax liability: [www.llotse.de/downloads](http://www.llotse.de/downloads)

**In the case of income from Switzerland, attach the following supporting documents:**

Salary statement including additional or supplementary sheets, salary statement from December or the last one from the tax year, proof of the employer's contribution to the daily sickness allowance (loss of salary) insurance, pension fund certificate (annual certificate at the end of the respective year), which shows the amount of the employee and employer contributions to the compulsory and non-compulsory pension fund. Certificate of health insurance contributions, if you are insured for health insurance in Switzerland; in the event of termination of cross-border employment, the statement of departure from the pension fund and proof of the whereabouts of the vested benefits.

Amount of foreign income, stated in Euro:

no

Do you receive a pension?

yes

no

Pension payments started on:

Testator's date of birth (for widow's pension):

Do you receive alimony payments from your divorced / permanently separated spouse (not child support)?

yes: please attach signed Annex U (Can be requested from us)

no

Do you have any other income (business, self-employed work, income abroad)?

yes: please explain and provide supporting documents for all revenue/expenses Issues (Income / Expenses) enclose (Excel tables for recording income and expenditure can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads))

no

Do you receive income from a photovoltaic system?

yes: please include the power supplier's invoice, documentation on the system's purchase costs, if appropriate proof of financing, insurance, account management fees, other documentation. The "Solar Power System" annex can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)

no

Do you have income from the sale of undeveloped, developed land or rights equivalent to real property (e.g. heritable building rights) if the period between acquisition and sale did not exceed 10 years?

yes: Attach proof of purchase and sale.

no

Do you have income from the sale of cryptocurrencies, antiques, works of art, vintage cars or similar assets (with the exception of items for everyday use such as cars) if the period between acquisition and sale did not exceed 1 year?

yes: Attach proof of purchase and sale.

no

**If you don't have children and have no income from rent and leases, you have now completed your statement. If not, please fill out the following pages.**

# Children

Do you have children?

yes: please answer the following questions.

no, continue to income from rent and leases on page 13.

**Information on children is only necessary as long as they are under 18 or have reached the age of 18, but are still in school, studying or undergoing professional training.**

## 1ST CHILD

### Relevant family benefits department

(location e.g. Bonn)

First name

Last name, if different

Date of birth

Tax identification number

Does a disability exist?

yes: Please include disability card

no

Date, from

Child's relationship to taxpayer:

natural child / adopted child

foster child

stepchild

Date, from

Child's relationship to spouse:

natural child / adopted child

foster child

stepchild

### Name, address and date of birth of the other natural parent:

(if different from own address)

Last name, First name

Address

Date of birth

Does the other parent fulfill their child support obligations?

yes

no

If you are a single parent, do you live alone with your child/ children?

yes

no

Where is the child registered?

registered with me

registered with the other parent

Own household, period:

Did you receive child benefits?

yes

no

Were fees for health and nursing insurances paid (for privately insured persons only)

yes

no

Does your child already have their own income (for example during professional training) whilst you still receive child benefits?

yes: Please include child's employment tax statement

no

Costs for child care: (annual total excluding dinner money, for example for nursery school, day care, minder, or similar)

School fees:

Please include the council notice or bank account statements (Childcare via grandparents, for example, is also possible.)

Template calculations for childcare can be downloaded:

[www.llotse.de/downloads](http://www.llotse.de/downloads)

Independent sponsorship or predominantly privately financed school. Attach supporting documents.

## FOR ADULT CHILDREN

Is your child still undergoing their first professional training?

yes:

### Student

Please include a copy of the student identification card

to

### Trainee

Please include child's employment tax statement

to

### Student

Please include child's certificate of matriculation

to

### Seeking training

to

### Other

no:

### Own income

since

### Unemployed

since

### Other

---

## 2ND CHILD

### Relevant family benefits department

(location e.g. Bonn)

First name

Last name, if different

Date of birth

Tax identification number

Does a disability exist?

yes: Please include disability card

no

Date, from

Child's relationship to taxpayer:

natural child / adopted child

foster child

stepchild

Date, from

Child's relationship to spouse:

leibliches Kind / Adoptivkind

foster child

stepchild

**Name, address and date of birth of the other natural parent: (if different from own address)**

Last name, First name

Address

Date of birth

Does the other parent fulfil their child support obligations?      yes      no

If you are a single parent, do you live alone with your child/ children?      yes      no

Where is the child registered?      registered with me  
    registered with the other parent  
    Own household, period:

Did you receive child benefits?      yes  
    no

Were fees for health and nursing insurances paid (for privately insured persons only)      yes  
    no

Does your child already have their own income (for example during professional training) whilst you still receive child benefits?      yes: Please include child's employment tax statement  
    no

Costs for child care: (annual total excluding dinner money, for example for nursery school, day care, minder, or similar)

School fees:

▶ Please include the council notice or bank account statements (Childcare via grandparents, for example, is also possible.)  
 Template calculations for childcare can be downloaded:  
[www.llotse.de/downloads](http://www.llotse.de/downloads)

Independent sponsorship or predominantly privately financed school. Attach supporting documents.

**FOR ADULT CHILDREN**

Is your child still undergoing their first professional training?

yes

**Student**

Please include a copy of the student identification card

to

**Trainee**

Please include child's employment tax statement

to

**Student**

Please include child's certificate of matriculation

to

**Seeking training**

to

**Other**

no:

**Own income**

since

**Unemployed**

since

**Other**

### 3RD CHILD

#### Relevant family benefits department

(location e.g. Bonn)

First name

Last name, if different

Date of birth

Tax identification number

Does a disability exist?

yes: Please include disability card

no

Date, from

Child's relationship to taxpayer:

natural child / adopted child

foster child

stepchild

Date, from

Child's relationship to spouse:

natural child / adopted child

foster child

stepchild

#### Name, address and date of birth of the other natural parent: (if different from own address)

Name, First name

Address

Date of birth

Does the other parent fulfil their child support obligations?

yes

no

If you are a single parent, do you live alone with your child/ children?

yes

no

Where is the child registered?

registered with me

registered with the other parent

Own household, period:

Did you receive child benefits?

yes

no

Were fees for health and nursing insurances paid (for privately insured persons only)

yes

no

Does your child already have their own income (for example during professional training) whilst you still receive child benefits?

yes: Please include child's employment tax statement

no

Costs for child care: (annual total excluding dinner money, for example for nursery school, day care, minder, or similar)

School fees:

Independent sponsorship or predominantly privately financed school. Attach supporting documents.

Please include the council notice or bank account statements (Childcare via grandparents, for example, is also possible.)  
Template calculations for childcare can be downloaded:  
[www.llotse.de/downloads](http://www.llotse.de/downloads)

## FOR ADULT CHILDREN

Is your child still undergoing their first professional training?

yes:

**Student**

Please include a copy of the student identification card

to

**Trainee**

Please include child's employment tax statement

to

**Student**

Please include child's certificate of matriculation

to

**Seeking training**

to

**Other**

no:

**Own income**

since

**Unemployed**

since

**Other**

## Income from Rent

Do you rent a flat or house?

yes: please include a copy of appendix V from the previous year and answer the following questions

no, you are done 😊

Type of object (e.g. Condominium, house, modern building, old building, restored property under historic and monument protection, restored property in redevelopment area):

Assessed value identification number (You can find this on the assessed value statement or the property tax statement):

Property address

Date of purchase contract or date of purchase price payment Date of transfer benefits and obligations

Rented since

Construction year

Monthly income from rent (net cold rent) include rental agreement

### ALLOCATION OF INCOME:

Tax payer

Spouse

%

### AREA / USE

Total size of the flat(s) for own use

Of these rented

m<sup>2</sup>

m<sup>2</sup>

Self used area

m<sup>2</sup>

**EXPENSES RELATED TO INCOME FROM RENT:**

Annex „Rental“ can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)

Common charge / incidental costs or operating costs statement

Please include documentation



Interest on mortgage

Property is no longer mortgaged

Please include annual interest statement without repayment portion



Other fundraising costs

Please include documentation

Property tax

Please include documentation

On acquisition: Purchase contract, notary, court, property transfer tax, if appropriate estate agent invoice and corresponding payment receipts (one-time)

Please include documentations

In the case of manufacture: an overview of the construction costs and payment receipts (one-time)

Please include documentations

Division of the purchase price into foundation, land and building value (one-time)

Work aid for calculating the division of the land purchase price can be downloaded: [www.llotse.de/downloads](http://www.llotse.de/downloads)

Maintenance expenses/ renovation or refurbishment costs

Please include documentations

Travel expenses for viewings and / or owner's meetings

Rides km of one way

Vacancy (please state period)

to

Flat is not currently rented due to (please explain: e.g. search for tenants, renovation):

Please provide documentation of intention to rent during vacancy (Requests, Immobilienscout)

Please include documentation

Further tax relevant information on rent

**I herewith confirm that I / we have made/provided all information, statements and declarations necessary to compile the tax return accurately and completely to the best of my/our ability.**

Location, date

Signature

**SAVE TIME AND TROUBLE:**  
*Simply sign with your PC mouse!*  
 Just click "Fill and sign" in Acrobat Reader and follow the instructions.

