



ver.di Bezirk Westfalen
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Checkliste for ver.di tax service consultation

For the initial processing of the tax case, we need the following documents:
(only if these apply)

- **Tax assessment** from the tax office from the previous year, if necessary advance payment notification
- **electronic income tax certificate**
- **Certificates of wage replacement benefits** (sick pay, short-time work allowance, unemployment allowance, partial retirement allowances, parental allowance, etc.)
- **Certificate of earnings for the month of December**
- **Children:** ID number, if necessary childcare costs (day care center, after-school care center, etc.), evidence of training / studies
- **Single parents:** Name and address of the parents who do not live in the household
- **Bank details**, church affiliation, marriage and / and date of divorce
- **Notification of pension receipt**, notification of company pension fund, if necessary proof of severance payment
- **Severely handicapped** ID card or letter from the pension office
- **Business expenses such as uniforms**, trips between home and work, external work, duration of home office, job-related training / specialist literature, etc., double housekeeping, union fees
- **Insurance documents with receipts**, health, care, accident, liability, additional health insurance contributions, Rürup / Riester pension (provider certificate according to § 10a)
- **Certificates of capital formation**
- **Extraordinary burdens** due to expenses for glasses, dentures, prescription fees, deductibles for medical and medical costs, home accommodation, maintenance costs for children for whom child benefit is no longer paid (proof of the supported person's own income)
- **Household-related services:** Tradesman's bills and other services with a transfer receipt (modernization, renovation, repairs, etc.) if they are carried out in your own household. Wages must be shown separately, operating costs statement from the landlord
- **Donation receipts**, party contributions
- **Declaration of consent** with your own signature and the signature of the spouse - only for the first consultation.