



The wage tax assistance provides tax savings.
Individually for each member.

We provide assistance for employees, retirees and pensioners in the following tax matters within the context of membership limited according to Section 4 No. 11 of the Tax Consultancy Act:

- Filing of income tax returns
- Individual examination of tax-saving opportunities
- Calculation of the prospective result
- Filling out tax forms
- Tax-assessment audit
- Full processing with the tax office

We perform all tasks associated with your income tax return.

Of course, this also includes applications for wage-tax reduction and general consultation services, e.g. in regard to topics such as employee savings allowance, housing subsidy and tax promotion for private pensions (Riester and Rürup insurance policies).

Your tax needs are our priority!

We are happy to provide consultation for pupils and students:

- For tax questions related to holiday jobs
- In regard to relevant tax issues for a person entering into professional life

We provide consultation for families:

- For choosing the most favourable tax bracket
- For the consideration of childcare costs
- For all matters related to childcare benefits according to the Income Tax Act
- For the offsetting of charges related to household employment relationships as e.g. household assistance
- For the offsetting of charges related to services within one's own household (including repair and modernisation work)

We provide consultation for pensioners:

- For all matters related to pension taxation
- For tax-related questions regarding nursing care
- For tax considerations regarding drug and medicine costs

More time for you; we provide consultation services

- For the determination of income from renting and leasing
- For questions related to capital gains tax

One premium – all benefits.

You only pay one fixed annual premium, no matter how often you use our services! Socially graduated from EUR 45 to EUR 375 – depending on your income – plus a one-time registration fee. Just one premium fee covers all our services.

Place your trust in us, and enjoy the beautiful things in life!

lohi
Das lohnt sich.



Lohnsteuerhilfe
Bayern e. V.

www.lohi.de

Your documentation checklist

- Electronic wage tax statements or pay slip/s December**
- Verification of wage-replacement payments,**
e.g. unemployment benefit, maternity benefit, insolvency compensation benefit, sickness benefit, ALG II (Hartz IV) [long-term unemployment benefit], parental benefit
- Change of the civil status,**
e.g. marriage certificate or civil partnership certificate
- Investment capital-forming benefits**
Certificate of the building society or investment institute
- Application for housing subsidy**
- Tax assessment from the previous year**
- Verification regarding advance payments,**
e.g. tax office or church tax office
- Identification number**
- Activation code** from the fiscal authority for the pre-filled tax return if available
- Bank information** (IBAN)
- For new members:** valid identification card or passport

Verification for your children

- Birth certificate and identification number**
- Childcare costs** (contract, bank account statement)
- Training contract**
- Wage tax statement**
- Training verifications:** e.g. certificate of schooling/study apprenticeship contract, Federal Education Assistance Act
- Tuition-fee certificate**

Verification for retirees and pensioners

- Electronic wage tax certificate**
(Occupational pension, Pension)
- Benefit verification for further pensions,** e.g. ZVK, VBL, Insurance annuities, Foreign pensions
- Pension notice or pension adjustment notification for the statutory pension insurance,**
e.g. old-age, widow's, occupational disability pension

Professional expenses

- Business travel, External activities**
(Possibly employer attestations)
- Expenses for dual households,**
e.g. rent, ancillary rental costs
- Tax consultancy costs**
- Application costs**
- Moving costs**
- Own further training, training,** e.g. course fees, travel costs, costs for master's examination or for studies
- Workroom,** e.g. room costs, equipment
- Expenses for work equipment,** e.g. specialist literature, tools, computers, workwear
- Dues for professional associations**

Special expenses

- Insurance premiums**
- Annual certificate of transmitted premiums for private health and nursing-care insurance
- Other insurance policies such as liability, accident, life or pension insurance
- Donation receipts,** e.g. charitable, clerical, cultural or party donations
- Private pension plan**
- Riemer pension
- Certificate according to Section 92 of the Income Tax Act
- Registration for social insurance of both previous years
- Allowance application of both previous years
- Certificate of transmitted premiums for the Rürup pension/base pension (concluded on 31.12.2004)
- in Bavaria: Church tax assessment of the previous year:**

Extraordinary burdens

- Household-related services in one's own household,**
e.g. costs for janitor, winter service, gardening
- Tradesman invoices for work in one's own household,** e.g. maintenance, painting, flooring work (only labour costs are deductible)
- Utilities settlement** of the landlord (or house management) of both previous years
- Alimony for entitled persons**
- Sickness costs,** e.g. doctor's fees, medication, dentist, glasses, costs for cure and medical treatment, hospital stay, travel costs to doctors, nursing-care costs
- Funeral costs**
- Verification of the degree of earning-capacity reduction, Degree of nursing care,** e.g. certificate or identification regarding physical disability or pension statement for accident pension (for children as well)

Other documentation

- Foreign income**
- Income from private sale transactions,**
e.g. sale of properties
- Rented properties,** e.g. rental contracts, maintenance settlement of house management, interest on debt, procurement costs, utilities settlement with the renter
- Statements for capital gains (interest)**
- Copy of exemption orders
- Tax certificates, e.g. for retained withholding tax (original)
- Company vehicle**
Old payslips, possibly driver's logbook and running costs for the vehicle