

Counsellor :



## Checklist income tax counselling

[illegible]

Personal details	
Bank details (name of bank, IBAN, BIC)	
Telephone number	
ver.di member number	
Identification numbers	
Date of marriage, divorce, permanent separation	
Date(s) of birth of child(ren)/Identification numbers	
Death of spouse, death certificate if required	
Record of family fund	
Required documents	
Most recent income tax assessment / church tax assessment if relevant	
Electronic certificate of wage tax deduction (incl. spouse)	
Monthly payslip (December)	
Statement of any capital-forming investments	
Expenditure for household-related services	
Bills for tradesmen's services at home	
Service charges / building maintenance costs	
Pension approval certificates/ notices of pension granted over the last 2 years	
Proof of disability, where applicable proof of disability of child(ren)	
Social security number(s)	
Advance tax payments	
Children	
Bills and receipts for childcare costs	
Child(ren) 18 years and above: proof of school attendance, apprenticeship	
Identification number(s)	

## Declaration of consent (member/family members)

First name and surname of member

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Address

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Membership number

ver.di sector

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### Declaration of consent

I agree that the personal data required for processing of my income tax return by the

#### **ver.di Wage Tax Service\***<sup>1</sup>

may be collected, processed and used in accordance with the provisions of the GDPR and the Federal Data Protection Act, as well as stored and processed in automated form. The data may only be used for specific purposes and for IT/EDP-related access, and then only by authorized ver.di personnel.

This consent is granted to the extent required to process my tax affairs. It includes disclosure to ver.di's honorary wage tax advisors, including the Central Working Group for Wage Tax Matters.

The wage tax advisors involved in the processing of these tax affairs are obliged to observe data secrecy in accordance with Section 53 of the German Federal Data Protection Act (BDSG).

The data may not be passed on to third parties, with the exception of

**DGB RS GmbH**, insofar as it is charged by ver.di with the further processing of my tax affairs.

#### **Furthermore, my tax affairs include the corresponding data of other affected persons**

(delete as appropriate)

My spouse/life partner .....

and my child / children: .....

.....

**Power of Attorney:** I hereby authorize my spouse/domestic partner to represent me in all matters relating to our income tax returns. This power of attorney/declaration of consent is valid until revoked.

The consent form(s)

is/are attached \* ☐

will be submitted later \*<sup>2</sup> ☐

Insofar as the written consent of my spouse/life partner or child/children is not possible for reasons of meeting the deadline, I will submit this promptly without delay. Otherwise, further processing of my tax affairs will not be possible. I reserve the right to withdraw my declaration of consent if I no longer wish my income tax return to be processed by the ver.di wage tax service.

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Date

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Signature(s)

\* (Please cross accordingly)

1 ver.di wage tax service: For the processing of the data, these are several honorary wage tax advisors

2 Please submit to the responsible ver.di district a duplicate of this declaration of consent, signed by all family members whose consent is required.

Periods of unemployment (proof of ... )	
Unemployment benefits	
Sick benefits	
Maternity benefits, parents' benefits	
Bankruptcy non-payment benefits	
Additional replacement benefits (for example partial retirement)	
Professional expenses	
Commuting expenses to regular place of work (distance to place of work)	
Public transportation expenses	
Receipts from union membership contributions, for example ver.di, GUV/FAKULTA	
Schedule and expenses for field service	
Travel expenses for field service (km)	
Receipts for workwear, dry cleaning of workwear	
Receipts for tools and work aids, reference books, PC etc.	
Receipts for (further) training courses (travel expenses)	
Receipts for cost of maintaining a double household	
Professional indemnity insurance	
Private accident insurance (1/2)	
Application expenses	
Telecommunication costs at home for professional use	
Relocation costs due to work	
Costs for tax consultancy (books/ software/tax counsellor )	
Costs of accidents on way to and from work and when travelling on company business	
Receipts for costs related to a study at home	
List of costs for studies for a second degree	
Evidence / account statements about contributions to ver.di membership, professional associations, political parties, other donation receipts	

Insurances (Receipts, account statements, policies)	
Third party car insurance	
Personal liability insurance	
Other liability insurances (for example boat, pets or animals)	
Life insurance	
Accident insurance , possibly only (1/2)	
Private care insurance	
Private pension fund or annuity insurance	
Private health insurance	
Regular support payments to divorced/separated spouse	
Donations	
Church donations	
Charitable donations	
Donations to political parties	
Political party membership fee	
Extraordinary expenses	
Receipts for nursing home costs for a family member	
Receipts for nursing costs of needy persons	
Receipts for support payments towards family members (national and abroad)	
Receipts for costs not reimbursed in case of sickness	
Record of spa treatments/therapies	
Costs in relation to divorce	
Funeral expenses for family members	
Log book for private trips of disabled person	
Replacement of household items in cases of force majeure	

No receipts –  
no refund from  
the tax office!!!!