Checklist: documents for your German tax return 2026

Not every line applies to you: tick what you have and strike what does not apply. Employers, health insurers and the pension fund already send a lot of data to the tax office electronically, and you can retrieve it from March. You do not send receipts with the return, you keep them in case the tax office asks.

Personal details

- [ ] Tax ID (Steuer-ID), also for your spouse or partner and children
- [ ] Tax number and last tax assessment
- [ ] IBAN for the refund
- [ ] Changes during the year: marriage, separation, birth, moving
- [ ] .....

Income

- [ ] Lohnsteuerbescheinigung from your employer
- [ ] Statements for parental benefit, sick pay, unemployment benefit or short-time work allowance
- [ ] Pension statement (Rentenbezugsmitteilung or Rentenbescheid)
- [ ] Annual tax certificate from your bank for investment income
- [ ] Income from renting out or side work
- [ ] .....

Work and work-related expenses

- [ ] Distance to work and number of days at the office
- [ ] Home office days, for example from your calendar
- [ ] Invoices for work equipment: laptop, desk, professional books
- [ ] Training courses and travel to them
- [ ] Trade union or professional association fees
- [ ] Job application costs and work-related moving costs
- [ ] .....

Insurance and pensions

- [ ] Health and long-term care insurance contributions
- [ ] Certificates for Riester and Rürup contracts
- [ ] Liability, accident and disability insurance
- [ ] Term life insurance
- [ ] Car liability insurance
- [ ] .....

Children

- [ ] Invoices for daycare, childminder or after-school care with proof of payment
- [ ] School fees for private schools
- [ ] Proof of maintenance payments if you live apart
- [ ] Proof if an adult child in training lives away from home
- [ ] .....

Donations and special expenses

- [ ] Donation receipts, up to 300 euros a bank statement is enough
- [ ] Membership fees and donations to political parties
- [ ] Church tax, usually on the Lohnsteuerbescheinigung
- [ ] Costs of a first vocational training or first degree
- [ ] .....

Illness and care

- [ ] Co-payments for prescription medicine
- [ ] Glasses, dentures or hearing aids
- [ ] Travel to treatments
- [ ] Care or nursing home costs
- [ ] Proof of a disability, if any
- [ ] .....

Household and tradespeople

- [ ] Tradespeople invoices showing the labour costs
- [ ] Household help, cleaning and gardening
- [ ] Service charge statement with caretaker, stairwell cleaning and winter service
- [ ] Chimney sweep
- [ ] Bank statement showing the transfer, cash payments do not count
- [ ] .....

As of November 2026. This page is guidance, not legal or tax advice.