

[Lohi makes it easy to do your taxes!]

What we support you in:

We prepare tax returns for employees, recipients of old-age and other pensions as part of our membership scheme and within the limitations set out in Section 4, No. 11 of the German Tax Consultancy Act.

Lohi's comprehensive service includes:

- Completing your income tax return
- Checking every option for you to save on your tax bill.
- Calculating your expected result
- Checking your tax assessment
- Handling all the submissions to your tax office, including making any possible claims or appeals

Where appropriate, we will also help you with:

- Applications for reductions in income tax
- Advice about tax relief for private retirement provisions (Riester / basic pensions)
- Application for building subsidies
- Advice on possible employee savings allowances

Also included as extra services for families and employees:

- Selection of the most beneficial tax bracket for you
- Offsetting of childcare costs
- Applications for child benefit
- Recognition of household-related employment relationships

For young people and people just starting out on their careers we can provide advice:

- on tax issues relating to your holiday job
- on all the tax issues surrounding your entry into the world of work, training, study and further training

For pensioners, we provide information about:

- all issues relating to pension taxation
- tax-related issues surrounding care
- possible tax reductions by taking into account costs of medical treatment, medicines and other treatments

In addition, we will check for you:

- Whether the costs of repair and modernisation work on your home can be offset against tax.
- We can work out your income from rentals and leasing.
- Questions relating to capital gains tax

One fee entitles you to all these services!

You pay only a fixed annual fee, irrespective of how often you use our consultation and other services! Our fees are staggered according to your income, meaning you will only pay between 59 euros and 429 euros per year – on top of the of a non-recurring admission fee of 15 euros.

As a Lohi-member you can also take advantage of an extended deadline for submitting your tax return!

lohi
Das lohnt sich.



Your documentation checklist

On your first visit, please also bring with you

- Tax assessment from the previous year**
- Tax identification number**
- valid personal identification card or passport**
(also applies to existing members)
- Tax advice costs** from the previous year

Income

- Income tax statement(s)** or wage slip(s) for December
(also applies to occupational pensions and other pensions)
- Pension statement or pension adjustment notification from your statutory pension insurance**, e.g. for an old-age, widow's, orphan's or a disability pension
- Benefit verification for further pensions**,
e.g. supplementary pension fund (ZVK), regional state pension fund (VBL), retirement annuities, foreign pensions
- Proof of wage replacement benefits**,
e.g. unemployment benefit, maternity benefit, insolvency payments, sickness benefit, unemployment benefit (ALG II) (Hartz IV scheme), parental benefit
- Foreign income**
- Income from capital gains**, e.g. sale of properties, trade in crypto currencies
- rented properties**, e.g. rental contracts, maintenance fee statements from the property management, interest on debt, service charge settlements paid by the tenant
- Statements for capital gains (interest)**
Tax certificates for withheld flat rate withholding tax, declarations of profits
- Income from marginal employment positions (mini jobs)**
- Income from training jobs or voluntary service**

Professional expenses

- Business travel, external activities**, e.g. travel/accommodation expenses or employer attestation, if applicable
- Interruption periods**, e.g. illness, short-time work, etc.
- Expenses for dual housekeeping**,
e.g. rent, ancillary rental costs, number of trips home
- Application costs**
- Moving costs**
- Own further training, training**, e.g. course fees, travel costs, costs for master craftsman's examination or for studies
- Home office, study**, Number of working days
- Expenses for work equipment**, e.g. specialist literature, tools, computers, work clothes
- Dues for professional associations**
- Expenses for pension advice**
- Expenses for training supervisor activities**,
e.g. travel costs, trainer's certificate

Verification for your children

- Tax identification number**
- Childcare costs**
(contract, bank account statement, reimbursements)
- Income tax statement**
- Certificates of education or training**,
e.g. certificates of schooling/studies, apprenticeship contract, federal education assistance (BAföG)
- Tuition fee certificate**

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
- Proof of donations and contributions**,
e.g. VdK, Johanniter, Bund der Versicherten, voluntary fire brigade or party donations
- Private pension plan**
Riester pension
- Certificate according to Section 92 of the Income Tax Act
- Registration for social insurance for both of the previous two years
- Certificate of premiums paid for the basic pension
- in Bavaria: Church tax assessment from the previous year**

Other tax reductions

- Household-related services / tradesman's invoices for work done in your own household**, e.g. winter services, gardening, maintenance, painting or flooring work, mini job (only labour costs are deductible, cash payments are not applicable)
- energy-efficient building refurbishment**,
e.g. installation of a new heating system/ventilation system, replacement of windows, new thermal insulation in the building plus specialist contractor certificate
- Service charge settlement** from your landlord (or the property management) for the last two years
- Maintenance/support payments**
- Healthcare costs**, e.g. doctor's fees, medication, dentist, glasses, costs for health and medical treatment, hospital stay, travel costs to doctors, nursing-care costs
- Funeral costs**
- Certification of the degree of handicap/impairment, degree of care required**,
e.g. certificate or statement of physical disability or certificate of entitlement to accident pension (also applies to children)

Other documentation

- Evidence of advance tax payments made**
- Bank account information (IBAN)**
- Evidence of contributions to capital formation**
- Application for housing subsidy**
- Notifications**, e.g. notifications of loss carried forward, community of owners

This is not the full list of our services! To reduce your tax bill, it is absolutely essential that you meet with us in person. There is absolutely no substitute for a personal consultation!

www.lohi.de