

DOCUMENTS – IRPF / IP — 2021

- ✚ Family situation: descendants/ ascendants/ couple →(who are living with you):
 - DNI – NIE-Passport of all of each of them and family book
 - Disability of any member: Certificate of disability
 - Large family: Certificate of it
 - Single-parent family: Children shared coexistence ?
 - Couple: Marriage-domestic partnership-...-DNI-NIE couple
 - Economic regime of the marriage (separation of assets/ assets both)
 - A copy of the IRPF 2020 (Income tax)

- ✚ Fiscal information of the A.E.A.T office. In case you don't have it, we will apply for it.

- ✚ Bank account for payment/return (IBAN)

- ✚ Work:
 - Certification of deductions on your salary (job)
 - Legal expenses
 - Professional association
 - Union fees

- ✚ Pension/Unemployment
 - Certificate/deductions INSS/SEPE...
 - Certificate/deductions of maternity allowance
 - ERTE certificate.

- ✚ Compensatory pension: For child/.....

- ✚ Pension plan cancelled.

- ✚ Main residence:
 - Letting:
 - Cadastral reference
 - Amount paid in 2021
 - Identification landlord: DNI/NIF/NIE
 - Lease for work in another municipality
 - Public aids receive for the rent
 - Rental agreement (initial and extension)
 - Paid receipts
 - Deposit on the Generalitat
 - ITP Tax paid to Conselleria
 - Buying
 - Deed buy Fees of the acquisition of your usual residence/restoration.
 - Amount paid on mortgage 2021

- Cadastral reference
- Public aids received
- Claims of the CLAUSULA SUELO

Properties:

- Deed buy/Expenses paid
- The receipt of the I.B.I. 2021
- Lease:
 - Identification tenant: DNI/NIF/NIE
 - Deduction certificate
 - M390 : VAT summary 2021
 - Incomes from letting
 - Expenses : Insurance-IBI-residents association.....-
 - Mortgage certificate

Buying/Selling properties:

- Deed of sale
- Donation made/received
- Previous deed buying
- Inheritance
- Vehicle buying : Vehicle subsidy Plan PIVE

Compensation received for Civil Liability.

Prizes received

Financial Investments:

- Certifications of deductions of financial entities (banking accounts, bonds, obligations, current account, etc...)
- Companies without stock market
- Life, death or invalidity insurances...

Economic activities:

- Balance – Loss & Profit List
- Presented forms
- Health insurance receipts
- Agricultural activities: Certificate of deduction/incomes

Governmental tax deductions:

- Child care expenses: Children under 3 years
- Parents: Employment situation
- Housing: Investing renewable energies
- Housing: Aid received for acquisition/refurbishment
- Housing: maintenance costs quality / access

- Housing: Lease for work more than 100km
- Donation with ecological purpose
- Aid granted from Generalitat (L 6/2009) for maternity protection
- School supplies
- Aid Generalitat for Electric Vehicles
- Donation of assets

- ✚ Reduction/deductions:
 - Contributions pension plans
 - Contributions disabled people heritage
 - Divorces case: Payments for childrens / Ex-spouse
 - Donations to entities without spirit of gain
 - Contribution to political groups
 - Maternity deduction
 - Laboral trajectory document
 - Childcare expenses
 - Reforms properties to decrease energy consumption

ATTENTION COVID-19 NEWS

- ✚ Ingreso Mínimo Vital (IMV): Family obligated to complete Income Tax
- ✚ Employment situation ERTE 2021

- ✚ Perceptions received for ERTes: SEPE certificate – Income Veracity
- ✚ Self-employed: Certificate of perceptions received for COVID-19

- ✚ Properties leasing: Special agreement with tenants for COVID-19
- ✚ Generalitat Aid (DL 3/20) workers in ERTE/ Reduction journal for family care

- ✚ Donations Investigation Program COVID-19
- ✚ Donations to cover fess COVID-19

REMINDER

- ✚ If we have calculated your taxes before, there's generic information that we already have from you.
- ✚ This is a general list, there will be documents that won't be necessary in your case.

- ✚ Call us as soon as possible to arrange a meeting (face-to-face or videoconference) so we have enough time to study all the documentation.