

DOCUMENTS – IRPF / IP — 2022

- ✚ 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 2021 (Income tax)
- ✚ 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 2022
 - 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 Consellería

- Buying
 - Deed buy Fees of the acquisition of your usual residence/restoration.
 - Amount paid on mortgage 2022
 - Cadastral reference
 - Public aids received
 - Claims of the CLAUSULA SUELO
- ✚ Properties:
 - Deed buy/Expenses paid
 - The receipt of the I.B.I. 2022
 - Lease:
 - Identification tenant: DNI/NIF/NIE
 - Deduction certificate
 - M390 : VAT summary 2022
 - 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 50km
 - Donation with ecological purpose
 - Aid granted from Generalitat (L 6/2009) for maternity protection
 - School supplies: For compulsory education and being unemployed
 - Aid Generalitat for Electric Vehicles
 - Donation of assets
 - Child Care Expenses / Ascendants in home with Indefinite contract
- ✚ 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

- ✚ Ingreso Mínimo Vital (IMV): Family obligated to complete Income Tax
- ✚ Employment situation ERTE 2022
- ✚ Perceptions received for ERTEs: SEPE certificate – Income Veracity
- ✚ Self-employed: Certificate of perceptions received
- ✚ 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 fees 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.