

# Personnel questionnaire trainees

(Fields with a grey background are to be filled in by the employer)

Company name:

Name of the employee

Personnel number

This personnel questionnaire is used to record personnel data for the DATEV payroll accounting programme as well as to register the employee. The completed personnel questionnaire is stored by the employer / payroll office in order to comply with the retention period.

Please note that registration can only take place on presentation of a **fully completed** questionnaire. Without registration, **no** payroll accounting can take place!

## Personal data

|  |                   |   |   |
|--|-------------------|---|---|
| Surname<br>maiden name as applicable                               | Given name        |   |   |
| Street and house number (incl. additional information)             | Post code, city   |   |   |
| Date of birth  | Gender            | <input type="checkbox"/> male                                       | <input type="checkbox"/> diverse<br><input type="checkbox"/> female <input type="checkbox"/> undetermined |
| Insurance number (as per social security card)                     | Marital Status    | <input type="checkbox"/> single<br><input type="checkbox"/> Married | <input type="checkbox"/> divorced<br><input type="checkbox"/> widowed                                     |
| Place & country of birth - <i>only if without insurance number</i> | Severely disabled | <input type="checkbox"/> yes<br><input type="checkbox"/> no         |   |
| Nationality  | IBAN<br>BIC       |   |   |

## Employment

|                                     |   |  |   |
|-------------------------------------|---|--|---|
| Date employment contract begins     | First day   | Place of employment                    |   |
| Description of profession           |   | Job performed                          |   |
| Highest level of education          | <input type="checkbox"/> School leaving certificate or equivalent<br><input type="checkbox"/> Abitur/Fachabitur (equivalent of A levels in UK)<br><input type="checkbox"/> No school leaving certificate<br><input type="checkbox"/> Haupt-/Volksschulabschluss (completion of secondary education) | Highest level of professional training | <input type="checkbox"/> Bachelor's degree<br><input type="checkbox"/> Diploma/graduate degree/master's degree/state examination certificate<br><input type="checkbox"/> PhD<br><input type="checkbox"/> No vocational training<br><input type="checkbox"/> Officially recognized vocational training<br><input type="checkbox"/> Master craftsman/technician/equivalent degree |
| Start of training:                  |   | Expected end of training:              |   |
| Holiday entitlement (calendar year) | Weekly working time in hours  |  |   |
| Cost centre                         | Department number   | Group of persons                       |   |

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## Steuer

|                       |                  |                          |              |
|-----------------------|------------------|--------------------------|--------------|
| Identification number | Tax class/factor | Child tax-free allowance | Denomination |
|-----------------------|------------------|--------------------------|--------------|

## Sozialversicherung

|  |   |
|--|---|
| Statutory health insurance   | Parenthood <input type="checkbox"/> Yes <input type="checkbox"/> no |
| In the case of private health insurance: <b>additionally</b> last statutory health insurance fund          | Children's data: Names and dates of birth                           |
| DEÜV status<br>0 - no indication<br>1 - Spouse / civil partner / descendant<br>2 - Managing Partner (GmbH) |   |

## Apprenticeship pay

| 1. Training year | Amount | Valid from | Hourly wage | Valid from |
|------------------|--------|------------|-------------|------------|
| 2. Training year | Amount | Valid from | Hourly wage | Valid from |
| 3. Training year | Amount | Valid from | Hourly wage | Valid from |

## Capital-forming benefits (VWL) - Only necessary if contract exists

|           |        |                                 |
|-----------|--------|---------------------------------|
| Recipient | Amount | Employer share (monthly amount) |
|           | Since  | Contract number                 |
| IBAN      | BIC    |                                 |

## Information of taxable previous employment periods in the current calendar year (these are time periods of employment accounted for on the income tax card)

| Time period from | Time period to | Type of employment | Number of employment days |
|------------------|----------------|--------------------|---------------------------|
|                  |                |                    |                           |
|                  |                |                    |                           |

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**Declaration by the employee:** I affirm that the above information is correct. I undertake to inform my employer without delay of any changes, in particular with regard to further employment (in respect of type, duration and remuneration).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
For minors Signature  
of legal representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employer signature

We are a tax consultancy whose offices are centrally located in the heart of Frankfurt am Main and were founded in Frankfurt in 1986.

Our tax consultants stand for the **highest quality of advice** and **perfect service** in all aspects of tax consultancy. Our tax advisors and employees with many years of experience provide you with competent support in all tax matters.

We mainly advise small and medium-sized enterprises, self-employed persons and freelancers **nationwide and internationally**. In tax matters, we support our clients from classic payroll and financial accounting to current tax returns and annual financial statements. In addition, we offer tax and business management advice.

The tax consultancy firm, Lübeck & Kollegen, Steuerberater GbR is a member of DATEV.

### Alles rund um's Personal:

Unsere Steuerberater beraten Sie gern!

Ob individuelle Beratung oder speziell angepasste Personalverträge. Unser kompetentes Team steht Ihnen immer zur Verfügung.



#### We provide you with...

... a **qualified direct contact person** (own email address and telephone extension), **solution-oriented and holistic advice, prompt processing** of your questions and problems and all that in an **easy-to-understand language**.

#### Our service areas:

- Payroll accounting
- Financial accounting
- Financial statements
- Tax returns
- Business start-ups
- Business consulting

Do you need more information on the subject of  
**"Personnel questionnaire trainees"**?  
Our competent tax advisors will be happy to support you!

**Hotline: +49 (0) 69 – 24 26 62-0**