

1. Personal information of the employee

Surname: _____
 First name: _____ Birth name (required): _____
 Date of birth: _____ Gender: Male Female Third gender
 Place of birth: _____ Country of birth: _____
 Nationality _____
 Street, number: _____
 Post code, town _____
 E-mail address _____
 Other acc. holder _____
 IBAN: _____
 BIC: _____

Do you have a severe disability Yes No If so, degree of disability _____

(Note: If so, please submit evidence)

2. Information on employment, tax properties and social security

- Pensioner Trainee _____
 Pupil/student Partner Close relative of owner

(Note: Enclose copy of pension statement or confirmation of school attendance or student status)

Highest school qualification:	Highest vocational qualification:
<input type="checkbox"/> 3 Mittlere Reife etc. (intermediate school qualification)	<input type="checkbox"/> 2 Recognised vocational qualification
<input type="checkbox"/> 4 Abitur/Fachabitur (advanced school qualification)	<input type="checkbox"/> 4 Bachelor
<input type="checkbox"/> 9 Qualification unknown	<input type="checkbox"/> 5 Diplom/Magister/Master/State examination
	<input type="checkbox"/> 9 Qualification unknown

This employment is my: Main employment Secondary employment

I have other occupations: Yes No

Since ...	To ...
The other job is:	<input type="checkbox"/> marginal employment <input type="checkbox"/> with own contribution to pension scheme <input type="checkbox"/> without own contribution to pension scheme Monthly wage: € _____ <input type="checkbox"/> not marginal employment

(Please list additional jobs on a separate sheet!)

Note: Marginal employment is deemed to exist where the monthly wage does not exceed €538 on a regular basis (taking into account the gross earnings from all simultaneously held marginal employment positions).

Is the employment limited to 30 months/70 working days per calendar year? Yes No

If so, have you had short-term employment in the current calendar year? **If so**, Yes No

please state the periods of these employments:

(1) From _____ To _____ (2) From _____ To _____ (3) From _____ To _____

**Personnel questionnaire for monthly earnings up to €538.00
or short term employment**

As at: Jan. 2024

Note: Short-term employment, which is tax-free for the employee, is deemed to exist if the employment is limited to three months or 70 working days in a calendar year or contractually limited in advance, unless the work is performed as a level and is compensated with more than €538.00 per month. Multiple short-term employments in a current calendar year are to be aggregated.

Tax class/factor: _____

No (**Note:** Proof of existing private health insurance enclosed)

Yes, with the following
provider: _____

Type of insurance: _____

Own membership

Family insurance

Agreement on wage tax deduction

Deduction in accordance with the mini-job scheme

Lump-sum formation: _____

2%

20%

Passed on to: _____

Employer

Employee

Deduction in accordance with individual tax characteristics (ELStAM retrieval)

3. Employee declaration

By signing below, the employee confirms that the above information, where obligatory, is true and accurate.

The employee undertakes to notify the employer immediately of any changes, in particular with regard to other employments (in terms of type, duration and payment).

The employee is aware that all data required to handle the employment relationship is stored electronically and processed in accordance with the data protection provisions, and that the confirmations of employment and secondary earnings are reported electronically to the Federal Employment Agency, and that they can object to this electronic forwarding.

4. Employer information

Office work only

Not exclusively office work

Wage: _____

Hourly pay: _____

Other: _____

Company pension scheme: where applicable, submit documents on company pension schemes (e.g. direct insurance, pension fund)

If leave statistics are requested specifically:

Annual leave: _____ Leave entitlement current year: _____

**Leaflet on the potential consequences of an exemption
from compulsory pension insurance**

General

Since January 1, 2013, employees in marginal employment (€538.00 Mini-job) are fundamentally subject to compulsory cover and full contributions to the statutory pension insurance scheme. The employee pays 3.6% (or 13.6% for marginal employment in private households) of the remuneration as a pension insurance contribution. This is calculated from the difference between the employer's lump-sum contribution (15% for marginal employment in the commercial sector or 5% for such employment in private households) and the full pension insurance contribution of 18.6%. Note that the full pension insurance contribution must be paid starting from a minimum salary of €175.00.

Advantages of paying full pension insurance scheme contribution

The advantages of compulsory insurance for the employee derive from the accumulation of compulsory contribution periods in the pension insurance scheme. This means that the employment period is fully incorporated in the fulfilment of the various waiting periods (minimum insurance periods). Compulsory contribution periods are required, for example, for early retirement with a pension, entitlement to rehabilitation benefits (both medical and work-related), entitlement to transitional benefits in the case of rehabilitation measures under the statutory pension insurance scheme, the establishment or maintenance of entitlement to a pension due to reduced earning capacity, entitlement to deferred compensation for a company pension scheme and the fulfilment of the access requirements for a private pension scheme with state support (for example, the 'Riester' pension) for the employee and, where applicable, even the spouse. In addition, the salary is taken into account in full, not proportionally, when calculating the pension.

Application for exemption from compulsory pension insurance

If the employee does not wish to be subject to compulsory insurance, they can apply for an exemption. To do so, they must inform their employer in writing – if possible using the enclosed form - that they wish to be exempt from compulsory pension insurance. If the employee holds multiple marginal employment positions, the application for exemption can only be submitted universally for all marginal positions performed at the same time. The employee must inform all other employers – including future employers – with whom they are marginally employed, about the application for exemption. The exemption from compulsory insurance is binding for the duration of the employment(s); it cannot be revoked.

The exemption is effective from the beginning of the calendar month in which the employer receives the application, but no earlier than the commencement of employment. The prerequisite is that the employer notifies the Minijob-Zentrale (Mini-job Centre) of the exemption by the next payroll, at the latest within 6 weeks after receipt of the application for exemption. Otherwise, the exemption does not begin until the end of the calendar month following the calendar month in which the Minijob-Zentrale receives the notification.

Consequences of exemptions from compulsory pension insurance

Marginal employees who apply for exemption from compulsory pension insurance voluntarily waive the above-mentioned benefits. As a result of the exemption, only the employer pays the lump-sum contribution amounting to 15% (or 5% in the case of employment in private households) of the remuneration. The employee does not have to pay their own contribution. As a result, the employee only accumulates months in fulfilment of the various waiting periods and the remuneration earned is also only taken into account proportionately when calculating the pension.

Note: Before an employee chooses exemption from compulsory pension insurance, it is recommended that they seek individual advice regarding the pension law implications of the exemption from an information and advisory centre of Deutsche Rentenversicherung (German Pension Insurance). The Deutsche Rentenversicherung service telephone can be reached free of charge at 0800 10004800. If possible, please have your pension insurance number ready when calling.

Attachment:

**Compulsory pension insurance for marginal employment in accordance with
section 6(1b) of Book Six of the Social Security Code (SGB VI)**

To be completed by the employee:

Surname: _____

First name: _____

Pension insurance number: _____

I hereby apply for an exemption from the compulsory pension insurance scheme as part of my marginal employment, and thus waive the opportunity to accumulate compulsory contribution periods. I am familiar with the information on the 'Leaflet on the potential consequences of an exemption from compulsory pension insurance'.

I am aware that the exemption application applies for all simultaneous marginal employment positions and is binding for the duration of the employment. I undertake to inform all other employers by whom I am marginally employed of this exemption application.

Place, date

Employee signature

To be completed by the employer:

Name (company
stamp): _____

I received the exemption application on (DD/MM/YYYY): _____

For payroll office: the exemption starts on
(DD/MM/YYYY): _____

Place, date

Employer signature

Note for the employer: The exemption application is to be added to the payroll files in accordance with section 8(4a) of the Contribution Procedure Ordinance (BVV), and not sent to the Minijob-Zentrale (Mini-job Centre).