

Checklist

We require the following information and documents to prepare your tax return:

Personal details/children

- Change in personal details: _____
- Notification of change of employment/ church affiliation / marriage / birth of a child / retirement / divorce (payment of alimony / inheritance etc.)

- Children: First name, last name, date of birth, school/training/studies (e.g. proof: matriculation certificate etc.), expected duration?

- Evidence of alimony payment or receipt of alimony

Income domestic and abroad

Income

- All salary statements (of both spouses)
- Salary statements on additional earnings such as school board compensation, public authority activities, fire brigade, etc.
- Accounting/statement of income/expenses for self-employment
- Confirmation (receipt) of pensions received from AHV, SUVA, pension fund etc.
- Confirmation of daily allowances received from unemployment/accident insurance, etc.
- Notification of any interruption of employment (unpaid leave)
- Income from undistributed inheritances

Deductions

Work-related expenses

- Rail/bus/tram season tickets for the corresponding year
- Information/change of mileage (in km) for car use
- Receipts for the expenses for further education/training
- Information about the rent for the flat and the number of rooms when using a home office

Debts

- Debt interest and balance statements as of 31.12. (including credit card statement)
- Notification of loans received as well as interest payments
- Significant unpaid invoices by key date (e.g. tax invoices)

Miscellaneous deductions

- Certificate of payment towards the third pillar (Säule 3a)
- Certificates on buy-ins into the pension fund
- Contributions to political parties
- Receipts for self-paid illness, accident and disability costs (e.g. doctor's, dentist's bills)
- Receipts for administrative costs of securities
- Receipts for charitable contributions (donations)
- Receipts for the payment of childcare costs
- Paid AHV contributions as a non-employed/non-working person

Assets domestic and abroad

- Receipts for life insurance policies and surrender value
- Information on the purchase / sale of vehicles (brand, price, year of purchase)
- Receipt of payment of a lump-sum pension benefit
- Shares/Assets in undistributed inheritances

In case of property ownership:

- For rented properties: receipts for rental income
- Valuation by the tax office from which the imputed rental value and asset value of the property can be seen
- Evidence of property maintenance or value-enhancing investments
- In case of new acquisition, copy of purchase contract / in case of sale, copy of sale contract

Securities

- Interest and balance statements as of 31.12. for all bank accounts, please refer to the securities list from the previous year!
- Interest / dividend receipts for all securities, please refer to the list of securities from the previous year!
- Notification of loans lent as well as interest payments received
- Tax statement on your securities deposit or
- Purchase, sale and income statements of securities

Miscellaneous/not to be forgotten

- All original tax return forms
- Receipt of received grants, gifts and inheritances or grants/gifts that have been made
- Any other assets with substantial value (e.g. art, jewellery) according to separate insurance policy
- For new clients; copy of previous year's tax return and last definitive tax invoice/assessment