

Check list in relation to the tax return

Personal situation

If your **personal and professional situation** (wedding, birth of children, separation, divorce, confession, address etc.) has changed, we need the exact date and the details.

Have you **supported a person in need**? If yes, we need the name, address, date of birth as well as the annual amount of support (please enclose supporting vouchers)

Income

All **salary statements** (Lohnausweis); including the salary declarations of the marriage partner.

Professional expenses (expenses in relation to earn the salary)

- In case of used public transport:
Ticket costs (for bus and train)
- In case of used car/motorbike:
Distance from home to office:
- Costs for professional education courses?
(If yes, please enclose copies of any expenditure)

Pension: Receipts of old age pensions received?

Have you paid or received alimony?
(If yes, please enclose vouchers)

List including vouchers of all other income
(For example: Directors' fees, lottery gains)?

Other expenditure

List of paid premiums for **health-, life- and accident insurance**.

- health insurance premium (annual amount)
- accident insurance premium (annual amount)
- life insurance premium (annual amount)

Did you receive a premium reduction from the health insurance company?

Official statements in relation to premiums paid into non-compulsory pension funds, so-called "**Säule 3a**"

In case of **purchases into pension fund**, please enclose statements

In case of any **costs for illness** which were not covered by the health insurance, please enclose copies of the vouchers.

<input checked="" type="checkbox"/> example
<input type="checkbox"/> no changes
<input type="checkbox"/> nobody supported
Please enclose the salary declarations
CHF: _____
km: _____
<input type="checkbox"/> no further education
<input type="checkbox"/> no pensions received
<input type="checkbox"/> no alimony paid or received
<input type="checkbox"/> no other income
CHF: _____
CHF: _____
CHF: _____
<input type="checkbox"/> no premium reduction received
<input type="checkbox"/> no payments (Säule 3a)
<input type="checkbox"/> no deposit made
<input type="checkbox"/> no material uncovered cost for illness

Do you suffer from one of the following diseases?

diabetic celiac disease aphasia

In case of donations to charities respectively political parties, please enclose the payment vouchers if payments exceeded CHF 100.

Statement of assets

Statements of assets (bank accounts, deposits, securities, etc.) as per end of the year including interest received respectively declaration of withholding tax.

Statement of dividends received from securities and values as per end of the year as well as statement of interest received from bonds and loans and principal value as per end of the year.

Did you open or close bank accounts? If yes, please enclose the date of the initiation respectively closure and the statements of interests received including balance as per end of the year.

Did you buy new shares or bonds? Please enclose the purchase vouchers and the interest received.

Did you sell shares or bonds? Please enclose the sales vouchers and the interest received until the sale.

Documents of **bank charges** paid for the administration of the securities (portfolio charges and safe-fee)

Inheritance and donations

Did you receive any **inheritance** or **donations** or did you make any donations? Please enclose copies of the relevant documents.

inheritance or donation

received or made

To whom or from whom: _____

Amount: _____

List of Debts

Statement of **interest paid for loans, mortgages and bank charges** as well as debt balance as per end of the year.

Statement of **other debts** as per end of the year (tax, private bills etc.). Please enclose a detailed list.

no

no material donations

please enclose all vouchers for all assets (bank accounts, deposits, securities, etc.) showing interest received and balance as per end of the year

no accounts opened or closed

no shares or bonds purchased

no shares or bonds sold

no inheritance or donations received or made

no debts

Other Assets

Did you **acquire new cars, boats, collections** (paintings, antiques etc.)? Please enclose details of purchase and price. Did you sell such assets, please enclose details of sale and price.

- Acquired cars: _____ Amount: _____
- Sold cars: _____ Amount: _____
- Other acquisitions: _____ Amount: _____
- Other sales: _____ Amount: _____

Did you take up a new **life insurance**. Please enclose a copy of the policies and detailed information on type of policy (e.g. risk insurance, life insurance with surrender value, non-compulsory pension "Säule 3a")

Did you **stop or re-buy any insurance policy**? Please enclose detailed information.

Land & Properties

Do you **own property** in Switzerland or in other countries? We need the assessed value for tax purposes. Did you purchase or sell any property? If yes, please enclose details.

Did you rent out a room, a flat or a house? Please enclose a list of the received **rental income**

Did you renovate your property / properties?
If yes, please enclose the invoices. Did you have expenses in relation to saving energy. If yes, please enclose the invoices.

Did you receive a new real estate register statement? Please enclose a copy.

no changes

no life insurance available

no property acquired or sold

no rent received