

Checklist tax return

Please fill in the following sheets as completely as possible. This will enable us to prepare your tax return as quickly as possible.

General

- ☐ Cover sheet of the tax return (from the tax office)
- ☐ Copy of the last tax return (only for new customers)
- ☐ Assessment rulings of the tax administration (if available)

Personal data of the children (only for new customers, newborn children)

Children up to your 18th birthday or children in training/studies aged 18 to 25, for whose maintenance you are responsible

- ☐ I **receive** alimony for children living in my household
- ☐ I **pay** alimony for children who do not live in my household
- ☐ I do **not** receive or pay alimony

First name, surname of children	Date of birth

- ☐ All **wage statements**
- ☐ Alimony received - attach credit notes or amount
- ☐ If self-employed: annual accounts / simple bookkeeping
- ☐ Unemployment benefit / RAV daily allowance Tax certificate
- ☐ Daily allowance certificate for sickness, accident, pension fund or IV daily allowances
- ☐ Pension certificate - AHV, IV, pension fund or accident insurance
- ☐ Lump-sum payment statement: Lump-sum payments from the IV, AHV or pension fund
- ☐ Other income

Deductions

Work location:		<input type="checkbox"/> By bike	
Workload:		<input type="checkbox"/> By car → KM single way:	
		<input type="checkbox"/> Public transport subscription costs:	

- ☐ Further training / school material / examination costs etc.
- ☐ Paid health insurance premiums / tax confirmation from health insurance company
- ☐ Voluntary contributions to Pillar 3 (Pillar 3a) - Confirmation receipts
- ☐ Paid alimony - payment receipts
- ☐ Childcare costs (KITA)
- ☐ Donations to parties / Alg. Donations
- ☐ Purchase into the pension fund - 2nd pillar confirmation
- ☐ Self-paid medical expenses (hospital, dental, spa costs, etc.)
- ☐ Contributions to persons in need of support: Payment receipts and proof of support from the municipality of residence

Debt

- ☐ Bank loans or similar - Credit statements / credit cards as at 31.12. (leasing is not deductible)
- ☐ Supporting documents for other debts

Assets

- ☐ Tax statements for all bank and postal accounts as at 31.12. (also abroad)
- ☐ Tax-assessed list of the bank for income from shares/bonds/investment funds
- ☐ Private vehicles (make, year of purchase, year, purchase price):
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- ☐ Lottery Winnings
- ☐ Credit balances/current accounts vis-à-vis own AG/GmbH: account statements as at 31.12.
- ☐ Inheritances: Income statement/copy of inheritance contract
- ☐ Life insurance: Surrender value certificate
- ☐ Cryptocurrencies
- ☐ Other assets (private loans, etc.)
- ☐ Interest and capital statements of condominium owners' associations

Real Estate

- ☐ Property value (market value)
- ☐ Income from rented real estate (including foreign real estate):
- ☐ Mortgage interest statement
- ☐ Receipts for paid maintenance costs/repairs/renovations
- ☐ Insurance/administrative costs