

Checklist for your tax declaration

General information – to fill in if you reach in the tax declaration for the first time or by changes

husband / single / person 1

surname, name _____
 address: _____
 phone _____ email _____
 date of birth _____
 civil status _____ religion _____

wife / person 2

surname, name _____
 phone _____ email _____
 date of birth _____
 civil status _____ religion _____

single household yes / no _____ rent CHF _____

Only for new clients: copy of the last tax declaration or final statement of the year before

Kids:

surname, name _____ date of birth _____

Name of school or employer (apprenticeship) of child living with you _____

Expected dates of graduation of child living with you _____

Income of child (salary, pension, stipend...) _____

paid fees for nursery, kindergarten, school, apprenticeship:

children living with you yes / no _____

surname, name _____ date of birth _____

Name of school or employer (apprenticeship) of child living with you _____

Expected dates of graduation of child living with you _____

Income of child (salary, pension, stipend...) _____

paid fees for nursery, kindergarten, school, apprenticeship:

children living with you yes / no _____

If parents don't live together in the same household:

Alimonies paid to receive

name and address of the other parent _____

year of birth _____ ZPV-nr. of the other parent _____

with whom are the kids staying _____

- costs of childcare of other people (the other person needs to declare it as income so you can deduct)
- training costs of kids (school fees, literature, way costs for car or train/bus, exam costs...)
- income of child (salary, pension, stipend...)

Income in Switzerland and Abroad

- Annual wage statement (Lohnausweis)
- statement of AHV-pension, 2nd pillar pension or other pensions
- daily allowance of health insurance, accident insurance, EO or unemployed insurance
- received alimony of divorced partner (name, address, year of birth)
- attendance money or director's fee's or royalty
- gift or heritage (tax-free if from parents or grandparents)

Work expenses

	man:	woman:
job / profession	_____	_____
place of work	_____	_____
occupation	_____ %	_____ %
car costs: daily distance (return)	_____ km	_____ km
public transport: single tickets / passes monthly	CHF _____	CHF _____
	<input type="checkbox"/> half-fare	<input type="checkbox"/> half-fare
contributions to professional association	_____	_____
<input type="checkbox"/> further education (course costs, transport costs, books or materials, if far away hotel costs)		
<input type="checkbox"/> weekly residents in another canton: rent	_____	

General deductions

- payments to 2nd pillar
- payments to 3rd pillar (Säule 3a)
- health insurance costs
- healthcare costs (statement of health insurance self-paid costs, dentist, glasses...)
- contributions to political organisations
- paid alimony of divorced partner or mother of kids when not married (name, address, year of birth) and/or for kids (name, address, date of birth)
- bank transaction certification of support to parents or close relatives abroad (if higher than
- charitable donations

Assets and debts in Switzerland and Abroad

- account balance and interests/fees of all the bank accounts per 31.12. (incl. accounts abroad)
- line up of deposit facility
- shareholding on AG or GmbH or any business abroad / received dividends
- loans given (name of person who received it, balance per 31.12. as well as interests received)
- other assets / movable property (for example car/boat/motorbike: brand, type, year and price of purchase)
 - car: (brand/typ) _____ year of purchase _____ purchase price CHF _____
 - _____
- cash / gold
- life insurance certification per 31.12
- heritage, part of not yet split heritages, joint ownership properties, gifts
- statement of debts and paid interests (hypothec, loans, credits)
- cash / gold
- document of interest paid on debts as stated in the table of debts
- Other debts per 31.12. (unpaid tax invoice , credit card etc.)

Real estate property in Switzerland and Abroad

- value (amtlicher Wert) and rental value for yourself (Eigenmietwert) of property
- rental income
- maintenance and repair costs (bring all the invoices – date of invoice count for the year to deduct)

- | | | | |
|---|-----------|-------------------------|-----------|
| <input type="checkbox"/> property tax | CHF _____ | rubbish | CHF _____ |
| <input type="checkbox"/> insurance GVB | CHF _____ | electricity (basic fee) | CHF _____ |
| <input type="checkbox"/> property-water-insurance | CHF _____ | wastewater / water (bf) | CHF _____ |
| <input type="checkbox"/> property-liability | CHF _____ | Schwellentelle | CHF _____ |

Self employed people

- same documents as employed people
- balance of accounts as well as profit accounting of self employed business
- Insurance payments daily allowance

Questions / comments
