



Checklist for tax return

This checklist should help you and us to prepare your tax return.

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As a first step, we would ask you to provide us with the following documents:

Income



Salary statements, statements on any additional income earned (e.g. board member fees, meeting attendance fees)

Pension statements (Old Age and Survivors' Insurance (AHV), disability insurance (IV), accident insurance, health insurance, unemployment insurance, widow's/orphan's pensions)

Statements for lump-sum payments (2nd/3rd pillars)

Statements regarding lottery winnings

Professional expenses



Statements regarding costs for further educational training

If you have your weekly stay at your place of work: rental contract, costs for travelling/meals

Receipts for actual other professional costs if these exceed 3% of the net salary

Expense regulations approved by the tax office

If you have an office at home, confirmation of the need for a home office by the employer



Securities/investments



Statements (tax certificates) for account balances and income on all assets (banks, post, securities). Please enclose comprehensive statements of securities in the form of tax certificates issued by the bank

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Statements for custody accounts and bank charges

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Debts/debit interest



Statements (bank/credit cards/loan agreements) for debts and debit interest charged

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Insurance policies/pension fund



Tax values of redeemable life insurance policies

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Confirmation of health insurance premiums

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Confirmation of ordinary and extraordinary contributions to pension fund/bank/insurance company (pillar 2, pillar 3a)

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Statement of healthcare costs if these exceed 5% of your net income

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Statement of costs related to your disability or that of a financially supported person and paid by yourself. Please enclose confirmation of the carer's allowance

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Properties



Official value (cadastral value, tax value, new assessments)

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Statement of rental income for properties rented out to third parties

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Statement of maintenance costs (e.g. maintenance, replacements, repairs, insurance premiums for buildings/glass breakage/water damage and liabilities/basic fees for waste and sewage disposal, management by third parties; renovation, conversion costs, property taxes) if the flat rate allowance (federal tax 10% / 20%; various for cantonal tax) is not claimed, photos before/after renovation

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As a second step, please answer the following questions:

General questions



Changes to marital status and religious denomination

Change of address and moving date

Children for whom a child deduction is claimed: first name and date of birth, education/school, thirdparty childcare costs (details of person taking care of the children), external/additional costs of education

Income



Duration of employment interruptions without compensation

Spouse or child maintenance (alimony) received, with amount, name and address of payer

Other taxable income (in addition to the income mentioned above)

Professional costs



Costs for public transport from place of residence to place of work



Vehicle costs/number of kilometres driven per day by (car/motorbike) from place of residence to place of work

If you use the vehicle to commute to work, please provide a short reason to ensure that the tax office will allow the deduction of the vehicle costs (e.g. time savings, use of vehicle during working hours)

Other professional costs such as work clothes/tools/specialist literature/home office, membership fees for professional associations etc. are compensated with a flatrate deduction of 3% of the net salary (minimum CHF 2,000 / maximum CHF 4,000). If higher costs are claimed, receipts confirming the expenses must be provided

If you have a company car or the transport to your place of work is paid by the employer, please provide us with the number of working days (without the days with direct field service)

Additional deductions



Spouse or child maintenance (alimony) paid (also living costs paid such as rent, taxes, etc.) with amount, surname, first name and address of recipient

Payments to persons who are unable to work and need support (receipts if they live abroad) with surname, first name, address, amount, relationship and reasons for support

Membership fees and donations to political parties with amount and description

receipts for donations with name of institution, amount and date of payment



Assets



Car/motorbike with year of acquisition and purchase price

Other assets (cash/valuables/collections) with description, year of acquisition and purchase price

Shares in undistributed estates, ordinary partnerships, building consortiums or limited or general partnerships

If you or a person that is represented by you (wife/children) received or paid out an inheritance, advances on an inheritance or gifts, please provide us with the name, place of residence, relationship, amount, date of gift/inheritance/advance on inheritance/distribution of inheritance or enclose a copy of the contract of donation or inheritance