



Checklist for the tax return

Important informations

Name, first name (man/woman): _____ / _____
Date of birth (man/woman): _____ / _____
Denomination (man/woman): _____ / _____
Profession (man/woman): _____ / _____
Workplace, address (man/woman): _____ / _____
Trip to work with (man/woman) / car, / motorbike, / bicycle, / public transp.
Phone/E-Mail: _____ / _____
New domicile? address/arrival date: _____ / _____

Informations about vehicles

Leasing: / Yes/No
Type/year: _____ / _____
Year of purchase/price: _____ /CHF _____

Leasing: / Yes/No
Type/year: _____ / _____
Year of purchase/price: _____ /CHF _____

Informations about children

First name:	Date of birth:	Address:	School/Education:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Alimony

Payer/home address: _____ / _____
Receiver/home address: _____ / _____
Alimony per year: CHF _____

Signature

Name and first name in block letters: _____
Signature _____



We need following documents (if applicable):

Basics

- Tax return (all forms)
- Copy of last year's tax return (only new customers)

Income and deductions

- Salary statements
- Pension statements (1st, 2nd and 3rd pillar)
- Statements of unemployment benefits or other daily allowance (military, maternity etc.)
- Statements of alimony (marital partner/children)
- Statements of lottery wins
- Season tickets of public transport
- Receipts of professional expenses
- Receipts of expenses for further educations
- Statements of payments into your pension fund (2nd or 3rd pillar)
- Accident or sickness costs (health insurance, dentist etc.)
- Receipts of donates
- Statements of financial contributions for Persons in need of help
- Statements of childcare costs
- Statements of heritage or donation

Asset and debts

- Bank/Post statements for the tax return
- Statements of securities (shares, bonds etc.)
- Statements of life insurance
- Statements of debts (hypothecary credit, personal credit etc.)

Properties

- Statements of house rent
- Statements of public rental value (tax office)
- Receipts of expenses for renovations etc.