

Tax return checklist

Personal data (for both partners)

- ☐ Date of birth
- ☐ AHV-Number
- ☐ Civil status
- ☐ Religious denomination
- ☐ Job / occupation
- ☐ Employer
- ☐ Pensum in %
- ☐ Self-employed (yes or no)
- ☐ Owner / Partner of company
- ☐ Phone number private and business
- ☐ Email

Minor children or children in training

- ☐ Surname / Name / date of birth
- ☐ School or apprenticeship company / end of training
- ☐ Income (Earnings, scholarship, annuity)
- ☐ Joint household with taxpayer (yes or no)
- ☐ Paid contributions for childcare

Persons in need of care (excl. partner and children)

- ☐ Surname / Name / date of birth
- ☐ Full address
- ☐ Paid contributions
- ☐ Joint household with taxpayer (yes or no)

General

- ☐ Forms of actual tax return received by the authorities
- ☐ Copy of last tax return
- ☐ Copy of last tax assessment notice from tax authorities
- ☐ Residence at 01.01. and 31.12. (for both partners)
- ☐ If marriage / separation / divorce: Date
- ☐ Securities and assets from heritage / donations resigned or received (receipt with name, address, date, amount)

Income (inland and abroad)

- ☐ Salary statements / directors' fees
- ☐ Annual financial statements with details (only if self-employed)
- ☐ Benefits which are not declared by the employer on the salary statement
- ☐ Annuity/Pension certificates
- ☐ Insurance payments and daily allowances
- ☐ Child- / Family allowances received by authorities directly
- ☐ Received alimony / Copy of divorce agreement (if any)
- ☐ Other income, e.g. lottery winnings

Properties (inland and abroad)

- ☐ Full address / lot or condominium ownership number / year of construction
- ☐ Estimates received by authorities
- ☐ Rental income (excl. running costs)
- ☐ Details reg. right of abode and other income
- ☐ Paid building lease fees
- ☐ Copy of paid maintenance costs (Repairs on building excl. furniture, property insurance excl. furniture, snow removal, service subscriptions for heating and lift, chimney sweeper, contributions in renewal reserve)
- ☐ If furnished holiday apartments rented: Number of rooms (without kitchen and bathroom), days rented, earnings, summary of actual costs for heating, electricity, cleaning)

Assets (inland and abroad)

- ☐ Certificates of interest and capital of all bank accounts as per 31.12.
- ☐ New accounts: Opening date / balanced accounts: Closing date and interest received by this date
- ☐ Shares / stocks / funds etc.: Quantity, title, nominal value, securities number, gross dividend and -interest received, buying and selling receipts, stock dividend, Splitting
- ☐ Loan amounts incl. received interest
- ☐ Vehicle: Brand, buying year, price
- ☐ Other assets, e.g. cash, precious metal, boats, art collections, etc.

Professional expenses

- ☐ Transportation expenses (Bus, train, bike, motorbike, car-km/day)
- ☐ Meals (not at home): quantity of days, canteen (yes or no)
- ☐ Additional costs for weekly residents: copy of rental contract for single room, costs of weekly homecoming)
- ☐ Costs for professional development and retraining: copy of receipts

Debts (inland and abroad)

- ☐ Mortgages, loans, etc.: Certificates of interest and debt as per 31.12.

Insurance premiums (inland and abroad)

- ☐ Health and accident insurance premiums per person
- ☐ Received allowance on health insurance premiums
- ☐ Life insurances: Company, Policy number, Issue date, termination year, insured amount, redemption value as per 31.12. and premiums paid (copy of certificate)

Illness costs

- ☐ Copy of high invoices not or only partially covered by any insurance: doctors, dentists, hospital, home care, etc.

Other deductions

- ☐ Paid contributions / alimony to separated or divorced partners and children
- ☐ Contributions for AHV and accident insurance if not shown on salary certificate
- ☐ Statement of special payments into your occupational pension fund (2nd pillar)
- ☐ Private pension statements (3rd pillar)
- ☐ Other deductions, e.g. donations to charity or to political institutions