



CHECKLIST FOR PRIVATE TAX DECLARATION

Personal Details (for new clients or changes only)

Taxpayer

First Name

Last Name

Address

E-Mail

AHV-Number (Swiss social security number)(swiss citizen only) / social insurance number

Phone

Place of work

Religion

Date of Birth

Spouse or Dependants

First Name

Last Name

E-Mail

AHV- Number (Swiss social security number)(swiss citizen only) / social insurance number

Place of work

Religion

Date of Birth

Personal Details - Children

First name and last name

Date of birth

Address (only if the child lives in another household)

School/Company of apprenticeship

Provisional end (Date)

General information and Documents (where available)

- ☐ New tax forms incl. Account bills that are already paid
- ☐ Copy of previous year's tax declaration (only new clients)
- ☐ Divorce decree or separation agreement
- ☐ Documents showing payment of alimony or alimony advances (incl. address of recipient)
- ☐ Reason in case of unpaid career-breaks
- ☐ Information on the level of employment (if not 100%)
- ☐ Relocation (Date and Address)
- ☐ Car/Motorbike (Brand, purchase price, purchase year, leasing yes/no)
- ☐ Commute to work (Abo of public transportation, Car); If Car: Reason, Distance in Km & number of trips per day
- ☐ Statements on inheritance you received, including an inheritance that hasn't been paid out or that is still being split (date, value, name and address of deceased or donor)
- ☐ Details on supported person: Full name, address, date of birth, amount paid
- ☐ Payment documents showing financial support for persons in verifiable need
- ☐ Salary certificate of main and side job, attendance fees, management board fees etc.
- ☐ Self-employed: Statement of income and expenditure or Balance sheet & income statement
- ☐ Pensioners: AHV-/IV-/pension fund statements or orders, other pensions/benefits



- ☐ Certificate of unemployment insurance
- ☐ Settlements/Statements of money/daily allowances or unemployment insurance funds, health insurances, accident insurances, SUVA and EO
- ☐ List of alimony or maintenance payments received
- ☐ Statement documenting imputed rental value and tax value (fair value) - obtainable from the municipal authority
- ☐ Properties outside CH: Market value (purchase price or actual assumed value) and address of property
- ☐ List of rental income for rented properties (if applicable)
- ☐ Invoices documenting Property maintenance (Maintenance, renovation costs for preserving the value of the property, operating costs for condominiums, building insurance)
- ☐ Balance- and Interest statement of all mortgages and loans per 31.12
- ☐ Balance- and Interest statement of personal loans, credit card debt, unpaid tax bills and other invoices per 31.12
- ☐ Tax statement of your health insurance (for each individual person) showing the premiums paid and the unreimbursed (out of pocket) health care costs, other health care costs (if applicable), e.g. dentist bills, doctor's certificate on necessary diets recommended by a doctor (e.g. coeliac disease). Please note: out of pocket health care costs must exceed around 3% of your net income to exceed standard health deduction.
- ☐ Pension: statements on pillar 3a contributions and voluntary buy-in to the pension fund (if not included in salary certificate)
- ☐ Statements documenting self-financed courses/trainings, membership contributions to professional associations
- ☐ Tax reporting and statements documenting childcare costs
- ☐ Donation receipts/ membership fees (to Swiss charities or political parties)
- ☐ Balance- and Interest statement of all Bank accounts per 31.12 (worldwide!)
- ☐ Tax statements on assets (shares, funds, private equity etc.), including value on 31.12. and interest/dividends earned during the year (incl. purchase and sales date)
- ☐ Statement documenting the current cash surrender value of the Life insurance and pillar 3a
- ☐ Tax statements on capital payments or distributions from the pension fund, pillar 3a and 3b or life insurance
- ☐ Value of other assets of considerable value (e.g. old-timers, boats, collections, noble metals etc.)
- ☐ Statement documenting subsidies you received for ecological or energy saving renovations.
- ☐ Income from civil service jobs e.g. fire brigade, schools etc. (please note accordingly on salary certificate)
- ☐ Statements on lotto/toto winnings
- ☐ Statements documenting asset management fees
- ☐ Statements for disability-related costs

For Expatriates (please provide us with the following)

- Rental contract
- Employment contract
- School fees for your kids
- Travel expenses from/to Switzerland
- Relocation fees