

CHECKLIST for SWISS TAX RETURN

(employed person / real property in Switzerland or abroad / without children)

- Information about religious orientation (Roman Catholic, Christian Catholic, Protestant or other/none) of all family members
- Salary statement/Pension statement of all your employers or pension payers during tax year (incl. small part-time income)
- Documentation of all expenses in relation to your employment, such as number of workdays per week, expenses for commuting (car or public transportation), training costs, other
- Other income, such as: alimony payments, daily allowance from insurance due to unemployment or inability to work, income from undistributed inheritance etc.
- Statement of all your bank accounts as per year end plus interest credit thereof during tax year
- Securities statement for tax purposes (inventory of all investments such as shares, bonds, options, investment funds etc. at tax value as per year end) - if possible, please ask your bank to issue a so-called 'Steuerauszug' as per year end; incl. income thereof during tax year
- Should it not be possible to get a 'Steuerauszug' from your bank, please provide us with all sale and purchase documents of securities transactions during tax year
- Documentation of interest paid during tax year (paid to banks or private people incl. interest for late payment, credit card etc.), documentation of all liabilities as per year end
- Documentation of alimony paid to former or separated wife as well as alimony paid to support your children
- Documentation of your payments made into third pillar during tax year; payback from third pillar (payments to voluntary private retirement plan)
- Documentation of extraordinary contributions to professional pension plan or payback from professional pension plan during tax year
- Documentation of paid health care contribution and – if applicable – received premium reduction payments during tax year
- Donations made to charitable organisations or political parties during tax year
- Summary of all expenses regarding illness and disability paid for by yourself (dentist, doctor, therapy, glasses etc.)
- Documentation of property, year of purchase, year of construction, tax value, deemed rental value, maintenance cost (reparation, insurance, maintenance of garden, other expenses)
- Information about inheritances and donations during tax year
- Documentation of surrender value of life insurance as per year end
- Information about other assets such as car (model, price, year of purchase), share in undistributed inheritance, other

