

CHECKLIST for SWISS TAX RETURN

(employed person / no real estate property / with children)

- Information about religious orientation (Roman Catholic, Christian Catholic, Protestant or other/none), name and surname and birth date of all family members; additionally for children: name of school, expenses for childcare
- 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.)
- 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

