

Checklist

Tax declaration

Documents	Check
New tax forms	☐
Copy of previous year's tax return (if not prepared by us)	☐
Any assessment decision from the last tax period	☐
Wage statements	☐
Supplement your personal data (please provide details on a separate supplementary sheet)	☐
Children: List all first names and dates of birth. Enclose receipts for childcare costs for the tax period in question.	☐
Certificates of loss of earnings and daily allowances from unemployment insurance, health insurance and accident insurance as well as SUVA, EO	☐
Retirees: AHV- or IV certificate or decrees, payment receipts from pension fund / other pensions	☐
Life insurance: Do you have a life insurance (possibly single premium)? Enclose a certificate or copy of the policy	☐
List of securities: Interest certificates for bank, postal and premium accounts, with capital statements as at 31.12. of the relevant tax year	☐
Account statement of share deposit etc. with interest / dividend confirmations, receipts for lottery winnings, receipts for inheritances paid out or not yet divided (inheritance distribution agreement / tax inventory). Request tax statement from the banks (if custody account available). Statement of the status of crypto wallets.	☐
Other Assets: Do you own other assets of significant value (motorbikes, boats, holiday properties, collections, jewellery, cash, gold, precious metals, etc.)? Please enclose a list of the items with the respective insured value.	☐
Do you own a car? Please let us know car brand, year of purchase and purchase price	☐
Enclose a certificate of received or paid alimony, separation / divorce agreement (a copy is sufficient).	☐
Donations to charitable organisations: Enclose receipts if the amount exceeds CHF 300.	☐
Real estate: Certificate of current imputed rental value and property tax value, details of the age of your property (year of construction), summary of any rental / lease income, invoices for maintenance costs, building insurance premiums. For newly acquired properties, enclose the purchase contract. Co-ownership (e.g. community of heirs): corresponding insert sheet	☐
Professional expenses: Number of kilometres travelled to and from the place of work. Number of meals away from home. Receipts for train, bus and tram travelcards. Receipts for self-financed further training costs and membership fees for professional organisations	☐
Asset management costs: Receipts for custody account fees and bank charges, asset management by third parties	☐
Pension provision: certificate of Pillar 3a payments, purchases into the pension fund (2nd pillar), surrender values of life insurance policies	☐
Receipt of capital benefits, pension fund and 3rd pillar (deposits & withdrawals)	☐
Proof of membership fees or donations to political parties	☐
Copies of invoices and receipts for medical expenses including dental costs not covered by health insurance (if they exceed 5% of net salary II)	☐
Financial support of demonstrably relatives in need (enclose receipts)	☐
Debts: Interest certificate with capital statement as at 31 December of the relevant tax year (mortgages, small loans, personal loans, etc.)	☐
Moving in from another canton or from abroad? Indicate date and previous tax municipality	☐
Miscellaneous: Please provide details on a separate supplementary sheet or by e-mail: Did you inherit or receive a gift during the tax period? If yes, from whom? How much? When? (enclose any contracts)	☐
In general: Briefly go through the tax return forms item by item. If you have any questions, please call us directly (044 877 72 72).	☐
Remember: We can only declare what you tell us.	☐

To ensure efficient processing of your documents, please refrain from using staples.