

## checklist tax return

Please provide us with the following documents and answer out questions. All your information has to be complete and correct.

Requirements met for a simple tax return at a flat rate? (see price list)  yes  no \*

\* Invoicing according to actual time spent at an hourly rate of CHF 190.00 plus VAT

### PERSONAL DATA

as at **31.12.2025**

person 1 (husband)

person 2 (wife)

last name	_____	_____
first name/s	_____	_____
address 31.12.2025	_____	_____
postal code / place	_____	_____
address <b>today</b> if changed (since when)	_____	_____
entry date Switzerland	_____	_____
date of birth	_____	_____
phone / mobile (in case of questions)	_____	_____
email (in case of questions)	_____	_____
swiss social security number (AHV-Nr.)	_____	_____
marital status	_____	_____
religion / confession	_____	_____
job title	_____	_____
employer	_____	_____
volume of work (in %)	_____	_____
if less than 100 %, on which days do you work?	<input type="checkbox"/>	<input type="checkbox"/>
	mo tu we th fr sa su	mo tu we th fr sa su
exact address of work (your place of work)	_____	_____

### CHILDREN up to 18 years or in education (25 y.)

last name / first name	_____	_____
religion / confession	_____	_____
date of birth	_____	_____
education (name of school and until when)	_____	_____
place of residence (in your household or address)	_____	_____
does spouse pay alimonies? (if separated)	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no

### ADDITIONAL QUESTIONS **⚠ please answer**

have you received in 2025  gift  premature inheritance or  inheritance ?  
 from: name, residence, relationship (father, nephew,...):      date of death      received at      amount

.....

have you made gifts in 2025?  yes  no (if yes, please fill out following information)

receivers name, residence, relationship (father, nephew,...):      date      amount

.....

have you received in 2025 payment (vested benefits) from pension fund (BVG/2nd pillar) or 3dr pillar (3a) or life insurance (3b)?  yes  no

date      amount

if yes :

please enclose certificate

.....

### general documents

- original forms of tax return 2025 (or a scan of the first page)
- copy of tax return previous year (new customers only)
- copy of last tax assessment**
- tax statement of health insurance 2025 or copy of a health insurance invoices 2025 (premiums 2025)

### income (in Switzerland and abroad)

- all salary certificates 2025
- income from social security (accident or health insurance), annuities and pension
- benefits unemployment insurance
- benefits (during military, maternity leave)
- received alimonies amount : ..... received from, name .....

### bank accounts and securities (in Switzerland and abroad)

- balances as at 31.12.2025 and interest statements for 2025 for all bank accounts (all over the world!!)
- shares, stock options and similar -> please provide us with a tax statement from your depository bank
- lottery earnings
- loans to: name :..... amount 31.12.2025 :.....  
interest received in 2025: .....

### liabilities (in Switzerland and abroad)

- mortgages, loans and similar, certificates of debt as at 31.12.2025 and confirmation of paid interest in 2025  
(Balance and interest statement)

### other deductions (please enclose confirmation or invoices)

- external childcare
- confirmation of paid AHV (only unemployed or self-employed person)
- contribution to 3rd pillar (Säule 3a)
- extra contribution to 2<sup>nd</sup> pillar (BVG) we don't need you pension certificate!!
- illness or accident costs which were not covered by insurance companies (tax statement) **⚠**
- dentist costs **⚠**
- charitable donations (only Swiss organizations)
- life insurances (tax statement as at 31.12.2025)
- paid alimonies amount : ..... name of receiver: .....
- professional training / further education: costs which were not paid by the employer (enclose invoices)



Medical and accident costs are only deductible if they **exceed 5% of the net income**. Net income is defined as the gross income reduced by expenses and general deductions.

way to work

person 1 (husband)

employment 1            shift work?  yes  no

place of work (give the exact address): .....

- bike
- train/bus
- car\*            reason see below \*  1  2  3
- motorbike\*    reason see below \*  1  2  3

employment 2            shift work?  yes  no

place of work (give the exact address): .....

- bike
- train/bus
- car\*            reason see below \*  1  2  3
- motorbike\*    reason see below \*  1  2  3

**⚠ please choose a reason if car or motorbike**

person 2 (wife)

employment 1            shift work?  yes  no

place of work (give the exact address): .....

- bike
- train/bus
- car\*            reason see below \*  1  2  3
- motorbike\*    reason see below \*  1  2  3

employment 2            shift work?  yes  no

place of work (give the exact address): .....

- bike
- train/bus
- car\*            reason see below \*  1  2  3
- motorbike\*    reason see below \*  1  2  3

\* reason **⚠ please choose a reason if car or motorbike**

1 car necessary for work according to employer's certificate (enclose certificate)

2 time savings of over 1 hour per day when using the car

3 lack of public transport

cars and other assets (without securities) in Switzerland and abroad

type of vehicle (car/motorbike/camper,...):

..... brand and model	..... first registration date	..... purchase date	..... purchase price
..... brand and model	..... first registration date	..... purchase date	..... purchase price
..... brand and model	..... first registration date	..... purchase date	..... purchase price
..... brand and model	..... first registration date	..... purchase date	..... purchase price

vehicles **in leasing** (is not subject to asset tax)

.....  
brand and model

.....  
brand and model

lease payment is not deductible  
interests are deductible only with interest statement 2025 from leasing company

other assets in Switzerland and abroad

other assets: cash, gold, precious metals, art collections, horses,...) .....

real estate owner **⚠️ only owner not tenants**  
in Switzerland

object 1: **⚠️**  rented out  self-inhabited /own use  
 detached house  apartment house  apartment  commercial property  land  
 address (street, number, postal code, place)  
 .....  
 construction year..... purchase year..... m2..... no. of rooms.....  
 imputed rental value (Eigenmietwert) CHF.....  
 property tax value (Vermögenssteuerwert) CHF.....  
 rent income 2025 (if rented) CHF.....  
 maintenance and administrative costs 2025 (enclose invoices) CHF.....

object 2: **⚠️**  rented out  self-inhabited /own use  
 detached house  apartment house  apartment  commercial property  land  
 address (street, number, postal code, place)  
 .....  
 construction year..... purchase year..... m2..... no. of rooms.....  
 imputed rental value (Eigenmietwert) CHF.....  
 property tax value (Vermögenssteuerwert) CHF.....  
 rent income 2025 (if rented out) CHF.....  
 maintenance and administrative costs 2025 (enclose invoices)

abroad

object 1: **⚠️**  rented out  self-inhabited /own use  
 detached house  apartment house  apartment  commercial property  land  
 address (street, number, postal code, place)  
 .....  
 construction year..... purchase year..... m2..... no. of rooms.....  
 purchase price in original currency (currency and price) .....  
 rent income 2025 (if rented) in original currency .....  
 mortgage abroad? Enclose certificates of debt as at 31.12.2025 and confirmation of paid interest in 2025  
 maintenance and administrative costs 2025 (enclose invoices) CHF.....

object 2: **⚠️**  rented out  self-inhabited /own use  
 detached house  apartment house  apartment  commercial property  land  
 address (street, number, postal code, place)  
 .....  
 construction year..... purchase year..... m2..... no. of rooms.....  
 purchase price in original currency (currency and price) .....  
 rent income 2025 (if rented) in original currency .....  
 mortgage abroad? Enclose certificates of debt as at 31.12.2025 and confirmation of paid interest in 2025  
 maintenance and administrative costs 2025 (enclose invoices) CHF.....