

checklist tax return

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

PERSONAL DATA

as at **31.12.2022**

	person 1 (husband)	person 2 (wife)
last name	_____	_____
first name/s	_____	_____
address 31.12.2022	_____	_____
postal code / place	_____	_____
address today if changed (since when)	_____	_____
entry date Switzerland	_____	_____
date of birth	_____	_____
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"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	mo tu we th fr sa su	mo tu we th fr sa su
exact address of work	_____	_____
phone / mobile (in case of questions)	_____	_____
email	_____	_____

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

last name	_____	_____
first name	_____	_____
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

have you received in 2022 gift premature inheritance or inheritance ?
 from: name, residence, relationship (father, nephew,...): _____ date of death _____ received at _____ amount _____

have you made gifts in 2022? yes no (if yes, please fill out following information)
 receivers name, residence, relationship (father, nephew,...): _____ date _____ amount _____

have you received in 2022 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 2022 (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 2022 or copy of a health insurance invoices 2022 (premiums 2022)

income (in Switzerland and abroad)

- all salary statements/certificates 2022
- 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 31.12.2022 and interest statements for 2022 for all bank accounts (**all over the world!!**)
- shares, stock options and similar -> please provide us with a tax statement from your depositary bank
- lottery earnings
- loans to: name : amount 31.12.2022 :
interest received in 2022:

liabilities (in Switzerland and abroad)

- mortgages, loans and similar, certificates of debt as at 31.12.2022 and confirmation of paid interest in 2022
(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 2nd pillar (BVG)
- illness or accident costs which were not covered by insurance companies
- dentist costs
- charitable donations
- life insurances (tax statement as at 31.12.2022)
- paid alimonies amount : name of receiver:

way to work

person 1 (husband)

first employment from to shift work? yes no

place of work (give the exact address):

- bike
- train/bus
- car* single trip (distance)km reason *
- motorbike* single trip (distance)km reason *

second employment from to shift work? yes no

place of work (give the exact address):

- bike
- train/bus
- car* single trip (distance)km reason *
- motorbike* single trip (distance)km reason *

person 2 (wife)

first employment from to shift work? yes no

place of work (give the exact address):

- bike
- train/bus
- car* single trip (distance)km reason *
- motorbike* single trip (distance)km reason *

second employment from to shift work? yes no

place of work (give the exact address):

- bike
- train/bus
- car* single trip (distance)km reason *
- motorbike* single trip (distance)km reason *

* reason

- 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

professional training / further education: costs which were not paid by the employer (enclose invoices)

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 2022 from leasing company

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

real estate owner
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 2022 (if rented) CHF.....
 maintenance and administrative costs 2022 (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 2022 (if rented out) CHF.....
 maintenance and administrative costs 2022 (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.....

copy of the purchase contract
 current market value if known CHF or original currency

rent income 2022 (if rented) CHF or original currency

mortgage abroad? Enclose certificates of debt as at 31.12.2022 and confirmation of paid interest in 2022

maintenance and administrative costs 2022 (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.....

copy of the purchase contract
 current market value if known CHF or original currency

rent income 2022 (if rented) CHF or original currency

mortgage abroad? Enclose certificates of debt as at 31.12.2022 and confirmation of paid interest in 2022

maintenance and administrative costs 2022 (enclose invoices)