

### 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 31.12.2019

**single person/husband**

**wife**

name / first name.....	_____	_____
address .....	_____	_____
postal code / place.....	_____	_____
entry date Switzerland.....	_____	_____
date of birth.....	_____	_____
swiss social security number.....	_____	_____
marital status .....	_____	_____
religion / confession .....	_____	_____
job title.....	_____	_____
employer.....	_____	_____
volume of work (in %) .....	_____	_____
if less than 100 %, on which days.....	<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"/>
do you work?.....	mo tu we th fr sa su	mo tu we th fr sa su
place of work (city).....	_____	_____
phone / mobile (in case of questions).....	_____	_____
email.....	_____	_____

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

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 2019  gift  premature inheritance or  inheritance ?  
 from: name, residence, relationship (father, nephew,...): date of death received at amount

.....

have you made gifts in 2019?  yes  no (if yes, please fill out following information)  
 receivers name, residence, relationship (father, nephew,...): date amount

.....

have you received in 2019 payment (vested benefits) from pension fund (BVG/2nd pillar) oder 3dr pillar (3a)  
 or life insurance (3b)?  yes  no

if yes :

please enclose certificate

date amount

.....

**general documents**

- original forms of tax return 2019
- copy of tax return previous year (new customers only)
- copy of last tax assessment
- health insurance policy 2019 or copy of a health insurance invoice 2019 (premiums 2019)

**income (in Switzerland and abroad)**

- all salary statements/certificates 2019
- 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 31.12.19 and interest statements for 2019 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 31.12.2019 :.....  
interest received in 2019: .....

**liabilities (in Switzerland and abroad)**

- mortgages, loans and similar, certificates of debt as at 31.12.19 and confirmation of paid interest in 2019 (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)
- illness or accident costs which were not covered by insurance companies
- dentist costs
- charitable donations
- life insurances (tax statement as at 31.12. 19)
- paid alimonies amount : ..... name of receiver: .....



**Cars and other assets (without securities) in Switzerland and abroad**

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

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

vehicles in leasing (is not subject to asset tax)

lease payment is not deductible  
interests are deductible only with interest statement 2019 from leasing company

.....  
brand and model

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

### Real estate in Switzerland

**object 1:**      rented             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 2019 (if rented)                            CHF.....
- maintenance and administrative costs 2019 (enclose invoices)            CHF.....

**object 2:**      rented             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 2019 (if rented)                            CHF.....
- maintenance and administrative costs 2019 (enclose invoices)            CHF.....

### Real estate abroad

**object 1:**      rented             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.....
- rent income 2019 (if rented)                            CHF.....
- mortgage abroad? Enclose certificates of debt as at 31.12.19 and confirmation of paid interest in 2019
- maintenance and administrative costs 2019 (enclose invoices)            CHF.....

**object 2:**      rented             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.....
- rent income 2019 (if rented)                            CHF.....
- mortgage abroad? Enclose certificates of debt as at 31.12.19 and confirmation of paid interest in 2019
- maintenance and administrative costs 2019 (enclose invoices)            CHF.....