

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 31.12.2018

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 2018 gift premature inheritance or inheritance ?
from: name, residence, relationship (father, nephew,...): date of death received at amount

.....

have you made gifts in 2018? yes no (if yes, please fill out following information)

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

.....

have you received in 2018 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 2018
- copy of tax return previous year (new customers only)
- copy of last tax assessment
- health insurance policy 2018 or copy of a health insurance invoice 2018 (premiums 2018)

income (in Switzerland and abroad)

- all salary statements/certificates 2018
- 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 31.12.18 and interest statements for 2018 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 31.12.2018 :.....
interest received in 2018:

liabilities (in Switzerland and abroad)

- mortgages, loans and similar, certificates of debt as at 31.12.18 and confirmation of paid interest in 2018 (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. 18)
- paid alimonies amount : name of receiver:

business expenses

way to work

single person/husband:

bike

train/bus place of residence/pl. of work: no of months à CHF

train/bus place of residence/pl. of work: no of months à CHF

car* motorbike*

place of residence/place of work: single trip (distance) number of trips/day
..... km

car* motorbike*

place of residence/place of work: single trip (distance) number of trips/day
..... km

wife:

bike

train/bus place of residence/pl. of work: no of months à CHF

train/bus place of residence/pl. of work: no of months à CHF

car* motorbike*

place of residence/place of work: single trip (distance) number of trips/day
..... km

car* motorbike*

place of residence/place of work: single trip (distance) number of trips/day
..... km

*** reason**

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

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

lack of public transport

others

single person/husband:

wife:

shift work? yes no

shift work? yes no

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 | 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 2018 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 2018 (if rented) CHF.....
 maintenance and administrative costs 2018 (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 2018 (if rented) CHF.....
 maintenance and administrative costs 2018 (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 2018 (if rented) CHF.....
 mortgage abroad? Enclose certificates of debt as at 31.12.18 and confirmation of paid interest in 2018
 maintenance and administrative costs 2018 (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 2018 (if rented) CHF.....
 mortgage abroad? Enclose certificates of debt as at 31.12.18 and confirmation of paid interest in 2018
 maintenance and administrative costs 2018 (enclose invoices) CHF.....