



Tax declaration check-list

We need these details and documents for your tax declaration:

- Changes in personal details (religious affiliation, marital status, retirement, occupation)
- Children: First & last names, date of birth, schooling/apprenticeship, expected graduation date

Income

- All salary/remuneration statements (primary and secondary occupations, fire brigade, work for public authorities, company director's fees, ...)
- Employment changes (new employer, occupation, part/full time working, unpaid leave, other place of work, shift work, ...)
- Statements of daily allowances received for unemployment benefit/accident insurance/maternity compensation
- Pensions: AHV/IV/occupational and private pensions/accident insurance/life annuities (incl. pensions and annuities outside Switzerland)
- Other income, e.g. alimonies, lottery winnings, corporate earnings, ...
- In the case of real estate ownership in and/or outside of Switzerland:
 - Rental income
 - Details/changes to rental value and wealth tax asset value
 - Receipts for property maintenance (e.g. condominium ownership: management statement of account incl. renovation fund), invoices for value-enhancing costs
 - In case of purchase/sale enclose a copy of the contract
- Revenue from crypto currency, settlement via Mining Yields/Blockchain

Deductions

- Details/changes of occupational expenses:
 - Public transport season tickets / travel to and from work (please state mileage, company car)
 - Receipts for vocational education and training costs (not initial vocational training)
- Statements of interest paid on mortgages and loans, credit card (interest/balance certificate)
- Certificates of contributions to bound personal pension provision (pillar 3a), pillar 2 buy-ins (occupational pension fund)
- Statements of alimony payments made
- Statements of AHV contributions by non-working persons
- Receipts for payment of childcare costs
- Receipts for self-paid sickness costs (health insurance certificate, doctor/dentist bills, retirement/nursing home bills)
- Receipts for charitable donations and contributions to political parties
- Statements of securities management fees (incl. cost of bank tax statement)

Assets

- Interest and balance statements for all bank and post office accounts as at 31 December (incl. balances held outside Switzerland) -> Please refer to the securities and credit balances form from last year's tax declaration.
- Portfolio statements together with interest/dividend settlements on all securities (In the case of a large portfolio with frequent activity, please order a tax statement.)
- Crypto Currencies Inventory 31.12., information on realised price gains
- Details of large amounts of cash at home or in a bank safe
- Details/agreements concerning loans granted/received
- Certificates for life insurance policies and their redemption values
- Details concerning purchase/sale of motor vehicles (make, price, year of purchase)
- Statements concerning payment of lump-sum pension benefits (pillar 3a/pillar 2)
- Information/receipts for gifts and inheritances received or disbursed
- Information concerning undistributed inheritances (communities of heirs)
- **Original tax declaration forms or letter from the tax office with access code**
- Copies of tax bills