

Checklist for tax returns

General documents

- Original tax return forms
- Copy of the last definitive tax assessment and the last tax return (only for new customers)

Income

- Salary certificate(s) / pension certificate(s) / IV decrees / daily allowance certificates / health, accident and unemployment insurance certificates
- Balance sheet / income statement or statement of income and expenditure from self-employment
- Tax statement of the banks or interest and balance statements of all bank as at 31.12.
- Securities account statements as at 31.12.
- List of any alimony received

Deductions

- Certificates of debts and interest paid as at 31.12.
- Certificates of contributions to pillar 3a
- Certificates of purchase into the pension fund
- Annual statements from health insurance companies
- List of self-paid health costs incl. receipts
- List of any alimony paid, including name, address and date of birth
- List of support payments (children/parents etc.) including name, address, date of birth. Possibly copy of divorce/separation documents
- Donation receipts
- Professional expenses

Real estate

- Current tax value and tax rental value of the property
- Invoices for property maintenance
For value-adding work, detailed description of the work and estimate of the value-adding portion
- Any rental income from third parties

Further information

- Vehicles
- Information on life insurance policies (certificate of surrender value)
- Details of any inheritances
- Details of other assets (jewelry/pictures/boats etc.)
- Children: first name, date of birth and details of education