



## Documents for tax returns

Please enclose us the following supporting documentation with your tax return:

Basically, you have to declare the entire worldwide income and assets at your main tax domicile (Switzerland). You must specify all foreign income and assets.

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|---|---|
| <input type="checkbox"/> Tax forms  | <b>Copy of the last tax return including tax assessment</b><br>Original forms of the Tax Office<br>Fire Service (yes or no)   |
| <input type="checkbox"/> Family changes                                   | Children growth, change of residence  |
| <input type="checkbox"/> Religious denomination                           | Reformed, Roman Catholic, Old Catholic, undenominational, other confessional  |
| <input type="checkbox"/> Extraordinary occurrence                         | Retirement, unemployment, reducing workload, work interruptions, marriage, divorce  |
| <input type="checkbox"/> Income revenue                                   | All wage statements for the declaration year, indicate reason for gaps  |
| <input type="checkbox"/> Sideline   | Receipts of entrance and expenses, fees, attendance fees.<br>Please attach receipts and records of income and expenses.   |
| <input type="checkbox"/> Daily allowance/statement                        | Unemployment pay, sickness benefits, daily accident benefits, disability benefits, if not declared in the salary certificate  |
| <input type="checkbox"/> Pensions/Benefits                                | Bank or post office receipts of monthly payments, certification or a copy pension card  |
| <input type="checkbox"/> Professional expenses                            | Vehicle: Driving kilometers to work, daily trips<br>Train, bus, tram: Subscription price of public transport<br>Canteen or restaurant (quantity of lunch per week)<br>Documents on weekdays other residence,<br>Documents childcare costs, necessary work equipment |
| <input type="checkbox"/> Education and further education                  | Deduction of expenses for the declaration year, any certificates retraining of children with documents  |
| <input type="checkbox"/> Vehicle  | Purchase or lease? Brand, factory price, first registration year  |
| <input type="checkbox"/> Community of heirs/<br>undistributed inheritance | Amount, devisor, address, other information   |



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|---|--|
| <input type="checkbox"/> Assets, securities                   | portfolio extract of all banks per Dec 31, or if not available interest statement and securities proceeds of the subject year as well as the account of sold and purchased securities in the subject year, time deposits accounts, dividends coupon, documents of lottery winnings |
| <input type="checkbox"/> Alimony                              | Paid or received alimony in the subject year, separately for children and divorced-spouse  |
| <input type="checkbox"/> Severe disability, Long-term care    | Medical certificate, cost compilation with documents, dental bills, medical expenses   |
| <input type="checkbox"/> Costs of sickness                    | Compilation or statement of medical expenses, dentist, optician  |
| <input type="checkbox"/> Supported persons                    | Bank statements, paid alimony  |
| <input type="checkbox"/> Financial precautions Säule 3a       | Certificate of bank or insurance company for Säule 3a  |
| <input type="checkbox"/> Insurance contributions              | Copy of the policies and receipts of paid insurance premiums, health insurance, accident insurance, life insurance without Säule 3a cash-in value confirmation   |
| <input type="checkbox"/> Interest on liabilities, liabilities | Interest statement and balance statements, credit and loan agreements  |
| <input type="checkbox"/> Voluntary contributions              | Vouchers and receipts of donations, contributions to political parties (if these exceed the amount of CHF 100.-)   |
| <input type="checkbox"/> Other cash inflows                   | Gifts, inheritances, anticipatory succession, Expiration endowment insurance<br>Severance of any kind  |



### House owner / Real estate

- |   |  |
|---|--|
| <input type="checkbox"/> Current market value, imputed rental | Concerning tax assessment of the property tax value and rental value / residency / usufruct  |
| <input type="checkbox"/> Mortgage interest                    | Existing mortgages at year-end   |
| <input type="checkbox"/> Mortgages                            | Interest receipts of paid mortgage interest in the declaration year  |
| <input type="checkbox"/> Rental income                        | Revenue in the declaration year  |
| <input type="checkbox"/> Maintenance costs                    | Costs in the declaration year (including costs of environmentally compliant heating rehabilitation, renovation or conversions)<br>all records incl. building insurance |

### Comment and statements

You ought to consider that we can declare only what you tell us.  
Please make us for special situations a note.  
Many thanks for your help.