

## Checklist for the private tax return

Good preparation and completeness of documents will make it easier for us to complete your tax return. Therefore we need the following documents from you:

- Last definitive tax assessment (calculation notice)
- Salary statement(s)
- AHV-, IV-, pension certificate pension fund (receipts)
- Other income, such as unemployment benefit, daily sick pay, an others
- Capital and interest certificates of all banks and PC accounts at Switzerland and abroad as of December 31<sup>st</sup> (including new openings and balancing)
- Tax statements from the banks of your securities accounts as of December 31<sup>st</sup> (Statements of assets are generally not sufficient because the income is not visible)
- Tax statements for depots with employee shareholdings (for example Morgan Stanley)
- Other assets as of Dezember 31<sup>st</sup> (safe balance, horses, boats, collections, gold, etc.)
- Car as of Dezember 31<sup>st</sup> with brand, date of purchase, purchase price, or note leasing
- Assets sold or acquired (inheritances, real estate, gifts, etc.)
- Inheritances that have not yet been divided (claim from the day following the day of death), including documents and list
- Official real estate appraisal
- Real estate: maintenance, operating and administrative costs (receipts, invoices). Important for wealth development
- Real estate: value-increasing investments (receipts, invoices).
- List of rental income received (copy of rental agreements if available)
- Funding contributions for energy-saving investments (proof)
- Feed-in tariffs for electricity (list/documents)
- Alimony, child support received or paid, or divorced spouses (attach proof of payment and agreement)
- Capital and interest certificates on mortgage debt and mortgage interest as of Dezember 31<sup>st</sup>
- Loans received or granted incl. interest (please attach contract)
- Other debts as of Dezember 31<sup>st</sup> e.g. outstanding tax bills, credit card, etc. (enclose copy)
- Certificate of paid-in contributions Säule 3a
- Certificate of purchase benefits into Säule 2
- Health insurance premiums (the health insurance company will issue a tax certificate upon request) / received health insurance premium reductions
- Sickness and accident costs (dentist, glasses, etc.), unless these are paid by the health insurance company
- Old-age and nursing home expenses (receipts, invoices)

# P R O T A X

- Third-party care costs for your children, e.g. day care center, daycare (care costs without meals are deductible)
- Donation receipts
- Tax values of life insurance policies as of Dezember 31st
- Professional expenses (expenses for the exercise of the profession)
- Self-paid further education and retraining costs incl. IT (purchases, technical literature, office supplies, etc. (Enclose invoices + statements of travel and subsistence expenses).
- Have you won the lottery and/or gambling?

## Husband / single

- Workload  Full-time employed  Part-time employed \_\_\_\_\_ (in %)
- Worklocation \_\_\_\_\_
- Commute with  Car \_\_\_ km/day (round trip)  
 Public transportation (attach receipts)  
 Moped / Bike

## Wife

- Workload  Full-time employed  Part-time employed \_\_\_\_\_ (in %)
- Worklocation \_\_\_\_\_
- Commute with  Car \_\_\_ km/day (round trip)  
 Public transportation (attach receipts)  
 Moped / Bike

Note: All income and assets in Switzerland **and abroad must be** declared.

This is how it continues: after receiving the documents, we prepare your tax return, consult with you if necessary and send you the completed tax return. All you have to do is sign and forward the documents to the tax office. As soon as you have received the final tax bill including the assessment, we ask you to send it to us as soon as possible (objection period: 30 days). Thank you very much.

If you have any questions, please do not hesitate to contact us.

Thank you and kind regards  
PROTAX Treuhand & Steuerberatungen AG