

Checklist for the tax declaration

What do we need?

Forms

- Empty forms of the current tax return
- Copy of the last tax return
- Definitive assessment ruling of the previous year (definitive tax return)

Personal details

- Marital status (single, registered partnership or married, separated, divorced, widowed)
- Children whose maintenance is provided for, with year of birth
- Church affiliation

Income from employment or self-employment

- All salary statements, including those for part-time and part-time employment (of both spouses)
- For self-employed persons: statement of assets and accounts

Replacement income and insurance benefits

- AHV-, IV-, pension fund certificate if obtained
- Orphan's pension certificate
- daily allowance certificates such as unemployment insurance, health and accident insurance

Other income

- Lump-sum settlements from pension funds in the event of payouts
- Participations in companies, if greater than 20
- Benefits not declared by the employer
- Other income like alimony

Professional expenses

- Study at home? Telephone, computer etc.
- Receipts for travel costs to the workplace (train, bus, bicycle, car etc.) Reasons for using a private vehicle with travel route and number of kilometres
- Compilation of training costs (supporting documents required)

Debts

- Debts as of 31.12 and debt interest statement for the whole year (credits, loans, taxes owed and amortization vouchers)
- Mortgage certificate as at 31.12 and proof of interest on debt for the whole year

Insurance

- Certificate for tied pension provision (pillar 3a)
- Certificate of purchase contributions to the 2nd pillar (BVG)
- Receipts for health insurance premiums and health insurance settlements (annual settlement of health insurance)

Real estate and land

- Official value and imputed rental value
- Statement of rental income if available
- Invoices / receipts for maintenance, operating and administrative costs

Other expenses

- Membership fees and contributions to political parties
- receipts for medical expenses
- Receipts about received health insurance premium reductions
- Receipts for donations
- Receipts for the payment of childcare costs

Assets

- All bank, postal and custody account statements as at 31.12
- Savings books with interest supplements until 31.12
- Statement for dividends received
- Interest statement for the year
- Donations or lottery winnings greater than CHF 1000