That's how it's done:

Collect all receipts and note down the required information according to our tax questionnaire. Upload the entire package to our NextCloud folder and send us a quick note once done.

Checklist

(if you send documents by post, please send copies and do not staple sheets together)

- Copy of the first page of the **tax forms** or the letter with the **login credentials** for the online tax return
- Copy of your **previous year's tax return** (only for new clients)

- **Income** (worldwide)
  - **Salary certificate incl. addendum** – if available - from main and secondary employment, directors' fees, attendance fees, etc.
  - If you receive employment income out of **self-employment**, the necessary information should be discussed in advance.
  - Statements showing **compensation and daily allowances** from unemployment insurance, health insurance, accident insurance, SUVA and EO
  - Old age-/ disability-/ pension fund certificates or regulations for **pension income** and other kinds of pensions
  - **Income from official activities**, e.g., school care, fire brigade etc. (please mark the salary certificates accordingly)
  - Confirmation of **lottery winnings**
  - **Alimony payments** from ex-partner with name and address details

- **Children**
  - **Name and DOB**
  - The information whether the child lives in your **household** or with someone else (in this case we also need the address and custody information)
  - Invoice for **childcare costs**
  - Directly paid **child and family allowances** that are not included on the salary certificate
  - **Alimony:** Confirmation of alimony paid or received (including name and address of beneficiary or payer), confirmation of advance of alimony, separation agreement if necessary
  - For children who are older than **18 years** and are still in **initial education** on 31st December, information on the training centre (school, apprenticeship, university etc.) and until when the education is likely to last (year). If the children are <u>no longer</u> in initial education on 31st December, please let us know.

- **Real estate** (worldwide)
  - Confirmation of **wealth tax value** and **imputed rental value (only for Swiss properties)**
  - Purchase price or market value for **foreign properties**
  - Information about the type of property (**house, condominium** etc.)
  - **Address** of the property
  - Overview of any **rental/ leasehold income**
  - Invoices for **maintenance costs, value-maintaining renovations, building insurance premiums, contributions towards the community cost & property taxes**
  - Confirmation of **subsidies** received for environmental protection and energy measures
  - **Purchase contract** (only for newly bought properties)
  - In case of **co-ownership** (e.g., community of heirs), information about your share
  - Information on **usufructuary rights**

- **Debts** (worldwide)
  - Year-end statement showing the value as per 31st December and interest paid during the year for all **mortgages, small loans, private loans, credit card debts** etc.
  - Evidence of **unpaid taxes**
  - Other **outstanding invoices**

- **Wealth** (worldwide)
  - Tax statements of **bank/ postal accounts** and premium savings accounts showing the balance as per 31st December and interest paid/ received during the year
  - Tax statements of **securities** (shares, funds, company shares, etc.) with the value as per 31st December and interest as well as dividends received during the year
  - Statement of **rental deposit account** (Mietkautionssparkonto)
  - **Crypto currencies**: balance as per 31st December and investment income received during the year
  - Proof of **asset management costs**
  - Statement of the current surrender value of the **life insurance** policy
  - Documents showing details of **inheritances** which have not yet been paid out or divided up
  - Statements concerning **inheritances** and **gifts** received (date, value/ amount, name and address of the testator or donor)
  - Documents proving **capital benefits received** from the pension fund or pillar 3a
  - Values of **other assets** of material value (e.g., vintage cars, boats, collections, precious metals, etc.)
  - **Car/ motorcycle**: make/ model, year of purchase, purchase price and information as to whether the vehicle is leased

- **Miscellaneous deductions**
  - **Professional expenses**: Number of kilometres driven to and from place of work or receipts of train, bus or tram tickets, receipts of self-financed training costs, membership fees from professional associations
  - If you have travelled to work with **your own vehicle**, please state the reason why (e.g., use of your own vehicle during working hours at the employer's request (confirmation needs to be provided), public transportation lasts at least 1 hour longer per day, no public transport connection between home and place of work or due to illness/ physical handicap (doctor's certificate to be provided))
  - Tax certificate of the **health insurance premiums** paid, and **medical expenses** borne by the insured person, if applicable copies of invoices for e.g., dental costs or doctor's certificate for medically prescribed diets
  - Statements showing **disability-related costs**
  - **Pension plan**: Certificates of payments into the pillar 3a and pension fund buy-ins
  - **Alimony payments** to the ex-partner (divorce decree or separation agreement) incl. name and address of the beneficiary
  - **Donations/ membership fees** to charitable organizations or parties in Switzerland
  - Proof of payment for **support contributions** for demonstrably needy persons (name, address, DOB, amount, document confirming e.g., degree of disability or sickness-related incapacity to work, alternatively, reason for the financial support)

- **Miscellaneous information**
  - If you have **moved** from another canton or from abroad, please state the date of your move as well as the date of your registration with the Swiss authorities and your previous place of residence
  - **Complement your personal details** on a separate sheet if not or incorrectly stated on the tax return form (e.g., occupation or religion)
  - Information on **foreign pension funds** incl. value as per 31st December

- **For clients with US tax liabilities**
  - **W2** for American employment income
  - **401-K, IRA** and **Roth IRA** balance sheet as per 31st December
  - **K-1**'s for American investments
  - Year-end statements for **HSA and 529 accounts**

Please note that we can only declare what you inform us about!

If you have any questions, please call us or send us an e-mail.