

# Checklist Tax return



## Personal Data:

Family name, First name:	.....	.....
	Taxable person	Spouse
Street / Number	.....	.....
Postal code / City:	.....	.....
Date of birth:	.....	.....
Civil status:	.....	.....
Confession:	.....	.....
Occupation:	.....	.....
Employer, address:	.....	.....
Telephone number:	.....	.....
E-Mail:	.....	.....

Have you changed your place of residence?  
If yes, please state your old address: .....

## Child(ren) up to 18 or in education:

Family name, First name:	.....	.....
Date of birth:	.....	.....
School / Company of apprenticeship:	.....	.....
Residence (if stay):	.....	.....
Family Name, First name:	.....	.....
Date of birth:	.....	.....
School / Company of apprenticeship:	.....	.....
Residence (if stay):	.....	.....

Do you live with your children?  yes  no

**Required documents and information:**

1. Completed checklist
2. Original forms of the current tax return
3. Copy of the tax return for the prior year / tax decision for the prior year (for new customers only)
4. Name of the religious affiliation
5. Medical expenses for the ongoing period of health insurance, as well as documents for tax purposes and dental expenses
6. Confirmations of the 2nd and 3rd pillar
7. Statements of all bank and postal accounts (interest and capital statement) as of 31.12.xx (worldwide)
8. Statements of securities accounts with holdings at the end of the year and information on income for the year
9. Status of credits/debts/mortgages at the end of the year and debt interest paid for the year
10. Information about property - data about cars, boats, horses, jewelry, etc.
11. Information on other income
12. Costs of the rent per year, without additional costs (only canton of Zug)
13. Child support (children) – received or paid
14. Donation expenditures, contributions to political parties
15. Expenditures on childcare (for children up to the age of 12) (receipts, invoices)
16. Expenditures on helping third parties in need (bank proof required)
17. Information about received heritages and donations

**For employees:**

1. Wage statement (main and additional work)
2. % employment of the husband \_\_\_\_\_ % of the wife \_\_\_\_\_
3. Number of drives to work per week:  
Mr \_\_\_\_\_ Mrs \_\_\_\_\_
4. Distance from home to workplace, km \_\_\_\_\_
5. Other job costs, formation, contributions
6. For unemployed – an attestation of the unemployment insurance fund

**For sole proprietors (Self-employed):**

1. Balance sheet and earning statement

**For pensioners:**

1. Pension statement (AHV, IV, SUVA, pension fund, ALV-calculation, etc.)
2. Information about the paid contributions in case you are not 65 years old yet

**For land owners:**

1. Tax valuation of real estate (imputed rental value / property tax value)
2. Any net rental income, i.e. excluding additional costs
3. Copy of invoices for property taxes, insurances, further expenditures
4. In case of sale of the real estate, a notarially certified contract
5. Statement or invoices for maintenance and renovation of real estate
6. Settlement of condominium owners' associations incl. renewal fund
7. For newly acquired properties – contract of sale, area, year of construction, mortgage contract

**Note:** We can only list what you provide us with evidence of on your tax return!

Place, Date: .....

Signature: .....