



tax audit consulting

tadico GmbH · Schärbächlistrasse 3 · CH-8810 Horgen

Checklist / documents for tax return

Personal Information:

Name / first name (man)

Name / first name (woman)

Address

ZIP/ village

Mobile

Email

Date of birth

Child (first name, birth, school/university)

Child (first name, birth, school/university)

Child (first name, birth, school/university)

Denomination

Profession

Please inform us about any changes regarding employment, marriage, birth of a child, retirement, divorce (payment of alimony), separation, inheritance, gift, denomination, affiliation, etc.

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Generally

- All original forms of tax return
- Copy of your last tax return
- Copy of the last final assessment
- tax payments in advance for tax year paid in tax year

Income (from both domestic and foreign)

- payroll statement (s)
- balance sheets and profit and loss statements for self-employed
- certificates of Directors' fees and meeting fees
- Statement of contributions received (alimony)
- pension payment statement (AHV, IV, BVG, LAA and other pensions)

Assets and shares (from the domestic and foreign)

- statements of your worldwide deposits, bank and saving accounts including the gross interest, withholding tax deducted and the balance as per 31.12
- statements of your worldwide shares and bonds (including dividends) as per 31.12.
- for larger asset portfolios- asset performance- and „Steuerverzeichnis“
- documents (contracts) on other assets (for example private loan given)

Real Estate (domestic and abroad)

- address, official value (if changes over previous year) for domestic property
- address, purchase price of the house/flat abroad
- rental value of owner-occupied property (if changes to previous year) for domestic property
- rental income if not owner-occupied
- Evidence maintenance costs (inkl. calculation Stockwerkeigentümergeinschaft, repairs, renovations, garden maintenance, replanting, insurance ..
- Details of changes in ownership (contract)

Professional expenses

- information about the distance between your home and the office (in km)
- if you use the SBB to your employer (bills)
- additional costs for those who return to the residence of their families at the weekend (rent, transportation costs..)
- invoices for further education (workshops, hotel, books...)
- invoices for work equipment paid by your own (notebook, ipad...)

Insurance and old age contributions

- statements of Swiss health insurance contributions showing your monthly premium
- treatment expenses if not paid by your health insurance (unless under 5% of your net income)
- statements for old age contributions (2nd pillar (BVG), 3a and 3b pillar)
- invoices for further education (workshops, hotel, books...)
- invoices for work equipment paid by your own (notebook, ipad...)



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Debt and interest on debt (domestic and foreign)

- bank confirmation: debt per 31.12 and interest paid for the year (mortgages, loans)
- Other liabilities (tax debt, credit card)

Other assets and deductions (domestic and foreign)

- Life insurance (policy, cash value)
- motor vehicles (car or motorcycle), type, purchase price, age
- Other assets such as art, jewelry and other valuable assets
- Information about heritage, community of heirs
- Information about donation received or given
- Statements of charitable donations
- Investments in furniture, cars
- If both parents are working: child care costs