

Checklist of required supporting documents

Tax return

- ☐ Tax return form (mandatory for new customers - without this form, you/we cannot complete a tax return. Please contact your local tax office).
- ☐ Last tax return (new customers only)
- ☐ Assessment decisions/final statement from the tax office

Income

- ☐ For employed people Salary statements / certificates (Main, secondary, part-time employment)
- ☐ For self-employed people: Balance sheet or income and expense statement (we do not need individual receipts)
- ☐ For (partly) unemployed: Daily allowances due to unemployment (RAV), illness, accident, maternity allowance
- ☐ Alimony received
- ☐ Pension certificates (AHV, IV, SUVA, pension fund certificate)

Assets

- ☐ Bank statements with balance and interest as of December 31
- ☐ Confirmation of closing balance for closed accounts
- ☐ Tax Report or custody account statements January 1 – December 31
- ☐ Loan(s) to others, interests
- ☐ Other assets (cash, gold/silver, collections, etc.)
- ☐ Tax values of life insurance policy(s)

Homeowners (Swiss and foreign real estate)

- ☐ Tax- or market value and imputed rental value (for new customers and newly purchased properties)
- ☐ Rental Income
- ☐ Mortgage amount and interest as of December 31
- ☐ Summary or Receipts for administration/maintenance/renovation/repairs

Deductions

- ☐ Commuting (public transport zones, car mileage, place of work, day / week or %)
- ☐ Self-paid continuing education
- ☐ Payments into pillar 3a, pillar 2 extra purchases
- ☐ Childcare costs (after-school care, childminder, nursery)
- ☐ Child support payments
- ☐ Alimony payments to ex-partner
- ☐ Dependents, over 2,800 Swiss francs per Year, Transfer receipts, names, year of birth, address
- ☐ Donations, party contributions, professional associations

- ☐ Home office¹ (net rent for all rooms, number of rooms)

Illness and disability-related costs

- ☐ Annual health insurance statement (premiums and deductible)
- ☐ Premium reduction if not shown on the annual statement
- ☐ Dental costs
- ☐ Costs for glasses, orthopedic aids, hearing aids, walkers, etc., if not covered by health insurance.
- ☐ Nursing home costs
- ☐ Disability-related costs, home care, etc.

Debts

- ☐ Credit card or personal loan balance with interest

Inheritances and gifts (received or given)

- ☐ Name, address, degree of kinship, amount in CHF

Motor vehicles (only for non-leased vehicles or vehicles more than 10 years old)

- ☐ Year of purchase and purchase price

¹ The home office must be a separate room used solely as an office. In most cases, it does not offer any tax advantages because meal and travel expenses can no longer be deducted. We would be happy to check this for you.