

Check list for tax return

- salary statement (incl. additional occupation and spouses)
- pension approval certification (OASI, retirement income insurance)
- unemployment confirmation
- daily allowance statement for accident, disability and health insurance
- child benefit confirmation
- interest and capital statements of all banks and Postfinance accounts per end of the year (31st December, worldwide)
- portfolio extract of all banks per Dec 31 or if not available interest statement and securities proceeds as well as the records of sold and purchased securities
- interest statements of share certificates
- statement for „Säule 3a“ banks and insurances
- cash-in value confirmation of life insurance
- invoices for costs of sickness (retention, health insurance, dentist, glasses / contacts)
- health insurance premiums incl. premium reduction (for the entire family)
- vehicle (brand / year of purchase / purchasing price), if available purchasing contract
- information about distance to work and home (train tickets, kilometer)
- confirmation for child support payment
- information to heritages and endowment
- For house owners (worldwide)
 - mortgage debt and confirmation of mortgage interest
 - documents for maintenance of real estate
 - new property evaluation
 - summary of house rent proceeds
- for expatriates (if not covered already by the employer):
 - confirmation of costs for children visiting the international school
 - confirmation for monthly rent paid
 - invoices / confirmation of costs regarding relocation
- for new clients a copy of the last tax return and tax assessment