

Checklist

What documents are needed?

- ✓ **Salary statement** (including partner) oder Balance Sheet / Profit & Loss statement **2020**
- ✓ For retired persons **Confirmation of retirement payments 2020**
- ✓ Bills for **child care** (day nanny, day nursery etc.) costs for education of children in apprenticeship or studies
- ✓ **Bank statements** (end of year) for all bank bank accounts, **shares, bonds etc.. Interest of 2020** and **balance as of 31.12.2020** must be declared.; if you have bonds please show number of years an interest rates; **dividend payments**
- ✓ Car, model and type, buying price and date of purchase, other assets (gold etc.)
- ✓ Life Insurance: Information about duration, **premium, value of repurchase**
- ✓ **3a insurances or banks** incl. **confirmation, additional payments to pension funds**
- ✓ **Annual premium for health care insurance 2020**
- ✓ Documents about **debts** (mortgages, loans, credits etc., including debt capital as of **31.12.2020** and **interest paid in 2020**)
- ✓ Donations for political parties in Switzerland
- ✓ If you have to pay or do receive **alimony (amount** incl the address of the recipient or person paying the alimony) / support of people not able to work
- ✓ Documents about charity payments, donations
- ✓ Deductibles from health insurance, doctors, dentists (**only money you paid yourself**)
- ✓ Professional expenses, **only actual costs** (tickets, food, further education etc.),
- ✓ Number of **kilometer for going to work**. Do you have a car provided by your employer?
- ✓ Properties / real estates: Documents about earnings and spendings
Tax value (amtlicher Wert) / official rental value (Eigenmietwert)
Net rental income as a landlord (without additional costs)
Bills for maintenance and repairs, **be aware that the date of the bill is important!** Bills for increasing the value of your properties are not deductible
Cost for electricity, water, wastewater, gas (**only basic costs**)
Insurances for the properties (GVB (fire), water, private liability, glass)
- ✓ Inheriteances / formular 8 if you did receive one
- ✓ Involvements (in companies, community of heirs etc.)
- ✓ **Copy of last tax return 2019**