

Checklist Swiss Tax Return 2016

General documents

- Original tax declaration forms
- Copy of the last Swiss tax assessment as well as a copy of the last Swiss tax return (only new customers)
- Name and birthdate of your child/children and particular information of education (for divorced/separated couples only)
- For separated/divorced couples: copy of divorce settlement/act of separation

Income

- Wage certificate(s), certificates for compensations from insurances i.e. for accident, sickness, unemployment benefit.
- Balance, profit and loss account for persons with self gainful employment
- Interest and wealth certificates of all bank accounts as per **31.12.16**
- Security bond certificates (shares, obligations, funds etc.) per **31.12.16**

Deductions from the income

- Statements for liabilities and interest paid (mortgages, loans) per **31.12.16**
- Statements for contributions to voluntary 2nd (buy backs) and 3rd pillar paid in **2016**
- Paid health insurance primes in **2016**
- List of paid sickness cost (settlements of health insurance)
- Statement/list of payments for illegitimate child/children with name, address and birthdate
- Statement of donations paid in **2016**
- Statement for cost paid for non-parental supervision of children (only for single parent or dual-income family)
- Professional expenses (usually necessary cost for public transportation)

Real Estate/Property abroad

- Swiss government estimation for the value/income of the real estate/Swiss property
- Estimation of real estate in foreign countries
- Invoices for maintenance/refurbishing/replacement of real estate
- Income from rent (tenancy agreement, lease agreement)

Wealth

- Car(s), boats etc. (purchase date, purchase price, year of manufacturing)
- Statement(s) from life insurances (buy back values)
- Heritage or donations received

Remarks:

.....

Please indicate **your e-mail address** in case we need some information. **Thank you!**