

# checklist for tax declaration 2016



Your tax declaration / return can be completed competent, if you collect the documents completely according the following list:

Please use **NO staples**, it will make us a lot easier to work with!

## General / Information / Formuals

- Originals of tax return (received from municipal tax office, DIN A3 folded) \*
- Copy of last year's tax return, if you have received it already
- Any civilian changes in comparison to previous year (details next page)
- Information from children, you support financial (details next page)
- Tax certificate of withdrawal from 2nd or 3rd pillar 2016  
(e.g. for purchase of property, start a business, leaving CH and EU, case of death, etc.)
- Information about inheritances and financial gifts received or given 2016
- Undistributed inheritances, (inventory control, account statements, etc.) / Switzerland or abroad

## Income

- Salary statement / s
- Tax certificate of received pensions from AHV or IV, Switzerland or abroad
- Tax certificate for received unemployment benefits/allowance (ALV)
- Tax certificate of further received daily benefits/allowance from accidents or disease
- Alimonies paid / received from or paid to separated / divorced spouse and children
- Further income (z.B. daily benefits, VR fee, fire brigade, private pensions, life insurance etc.)

## Deductions

- Expenses of traveling to work (train, bus, bicycle, car, etc.)
- Training / retraining, further education costs (paid in 2016), professionally-related
- Schedules, expenses, parking-fees, travel-expenses for advanced training, professionally-related
- Confirmation for payments into 2nd/3rd pillar (life insurances) and purchase of pension benefits
- Tax certificate health insurance (please ask for, if not automatically received)
- Copies of invoices of self-paid health cost, such as dentist or physiotherapy, etc.
- Donations (if overall more than CHF 300.- a year)

## Asset

- Bank account statements at 31.12.2016 / tax certificates of interest and dividends / closing statements
- US-Accounts: 1099/K-1 statement plus year-end summary overview
- Tax reports for Switzerland of your security deposits (please ask your bank), Switzerland or abroad banks
- Lottery profits, if withholding taxes deductet (original document needed)
- Confirmation of interests of debts 2016 (mortgage, private loans, bank loans, credit cards, etc.)
- Car/s & motorbikes & ships (brand, acquisition year, purchase price), Leasing? Yes  No
- Repurchase value of certificates from life and pension insurance (3rd pillar b)

## Child care costs

- Child care costs (ask for a tax certification or annual overview) , for double-income earners and single parents

## Property owner

- Maintenance, operational and administrative costs (copies of receipts, invoices, etc.)
- Summary of maintenance, especially for floor owner (ask your property management for it)
- Tax information about value of your property (your tax authority will provide a sheet)
- Income / interests from leasehold and rentals
- Tax certificate for paid debt interest (mortgage and other )

## Additionally for self-employed

- Balance sheet & income statement 2016, if not done by us
- Documents for all further expenses (such as telephony, mobile, internet, advertising, etc.)

\*Amendments in company car using-laws! Is your salary statements telling your pensum of off-site workdays?

If you have any questions, don't hesitate to contact us:

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# NOTES



## changes personal data in comparison to year 2015 (at December 31st 2016)

	husband / Person 1	wife / Person 2
family / given names	_____	_____
civil status	_____	_____
confession	_____	_____
employer	_____	_____
job title	_____	_____
job location	_____	_____
company car owner: mainworkplace	_____	_____

## further changes in comparison to year 2015

### birth of a child

family / given name	_____	_____
date of birth	_____	_____
address if not the similar	_____	

### education

#### Husband / Person 1

#### Wife / Person 2

education	_____	_____
start - end	_____	_____

### property

purchasing/selling date	_____	price / currency: _____
	_____	_____

### civil changes (wedding, case of death, divorce, separation)

date of change \_\_\_\_\_

### information, notes and questions

(such as alimony, emplye-changes, inheritance, property maintenance information, questions, need-to-knows, etc.)

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