



Checklist for tax return

General Information:

- ☐ Main form of the current tax return (mandatory)
- ☐ A copy of last year's tax return (for new customers only)
- ☐ Personal information such as: Date of birth, denomination, marital status, residential address, telephone number, e-mail address, etc.

First name:		Denomination:	
Name:		Marital status:	
Date of birth:		Telephone number:	
Residential address:		e-mail address:	

- ☐ The following information must be available for children: Name, date of birth and denomination

1. Child		4. Child	
2. Child		5. Child	
3. Child		6. Child	

- ☐ Occupational data: Work function, place of work and means of transport (public transport or car)

Work function:		Means of transport:	☐ by public transport ☐ by car
Place of work:		If car, KM driven:	

☐ Make/Model:		Year:		Price:	
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- ☐ Interest and capital certificates as at 31 December (e.g. bank accounts, securities deposits, mortgages and other debts)

Incomes:

- ☐ Employer wage statements or general employment office receipts, AHV, IV, pension fund, etc.
- ☐ Received or paid alimony (incl. costs and information from persons)
- ☐ Further income such as: Inheritance, gift, lottery prize, charitable donation, etc.

General deductions:

- ☐ Contributions to pillar 3a, 3b and pension fund
- ☐ Receipts from the health insurance fund such as premiums, incurred medical expenses, premium reduction
- ☐ Vocational training costs / retraining costs (language courses and other courses)
- ☐ Evidence of incurred childer support (KITA, playgroup, nanny)
- ☐ Donation receipts
- ☐ Life insurance certificate



Nikles TrustTax der Online-Steuerberater des Vertrauens

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Homeowners, self-employed persons:

☐ Data for real estate: property value, imputed rental value, any rental income and maintenance and renovation costs (incl. copies of invoices)

☐ Self-employed: Annual financial statements as at 31 December in accordance with the Swiss Code of Obligations

(OR Art. 957 et seq. Obligation to keep accounts and to present accounts)

My contact details for queries:

Phone	
E-mail	
Notes	

Location and date

Signature