

# general check list for tax declaration



Your tax return can be completed competently if you collect your documents completely:

**Please DO NOT use staples, your documents will be scanned!**

Check your online bank, insurance, health insurance accounts, many receipts are available online!

**Please refer to the reverse for information on submitting receipts to us online!**

## Forms / Orders / Invoices / Information / Miscellaneous

- Tax forms or transmission codes
- new costumers:** Copy of last year's tax return
- all information / changes according to next page
- Tax certificate of withdrawal from 2nd or 3rd pillar (lump-sum benefits)
- Information about inheritances and financial gifts received or given (statements needed, including documents, data of relatives, contracts, bank statements)
- Information on communities of heirs in which you are involved (statements, bank statements)

## Income / Switzerland and worldwide

- all yearly Salary statement/s, main and subsidiary income (if more than one employer)
- Tax certificate of received pensions from AHV or IV, Switzerland or worldwide
- Tax certificate for received unemployment benefits/allowance (ALV) or similar (parental leave, military, etc.)
- Alimonies and annuity contributions paid or received from or paid to separated / divorced spouse and children
- Other income (z.B. daily benefits, VR fee, fire brigade, private pensions, life insurance etc.), please specify

## Deductions / Switzerland and worldwide

- Transportation expenses from home to place of work (train, bus, bicycle, car, etc.) / driven kilometres
- Confirmation for payments into 2nd/3rd pillar (life insurances) and purchase of pension benefits
- Professionally-related training / retraining, further education costs, professionally-related (self paid)
- Schedules, expenses, parking-fees, travel-expenses for advanced training, professionally-related
- 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.
- Charitable donations for Swiss registered companies (if overall more than CHF 300.- a year)
- Other deductions (such as non employe contributions, extraordinary expenses, etc.)

## Asset and Debits / Switzerland or worldwide

- Bank account statements at 31.12.202x / 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 deposits (please ask your bank), Switzerland or abroad banks
- Lottery profits, if withholding taxes deductet
- Confirmation of paid interests of debts 202x (mortgage, private loans, bank loans, credit cards, etc.)
- Car/s & motorbikes & ships (brand, acquisition year, purchase price), Leasing? Yes q No q
- 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  
***please ask the institution for a tax certificate, preferably divided per child***

## Real estate owner / Switzerland and worldwide

- Tax information about rental value of your property (your tax authority will provide a sheet)
- if rented out: rental income and tenant names, monthly rent (net and gross), specify vacancies
- Maintenance, operational and administrative costs (copies of receipts, invoices, etc.)
- Summary of maintenance, especially for floor owner (ask your property management for it)
- Tax certificate for paid debt interest (mortgage and other, from your bank)

## additionally for condominium owners

- Settlement & shares of the condominium owners (service charge and operating cost settlement by management)

## Additionally for self-employed

- Balance sheet & income statement 202x, if not done by us, including documents

# Notes & details | Online transmission



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## changes personal data in comparison to previous year (qualifying date: December 31st 202x)

	Person 1	Person 2
family / given names	_____	_____
civil status	_____	_____
gender	_____	_____
date of birth	_____	_____
address	_____	_____
job title	_____	_____
employer	_____	_____
job location	_____	_____
confession / church	_____	_____

## further changes in comparison to previous year

### birth of a child or children

family / given names	_____	_____
date of birth	_____	_____
address <i>if not identical</i>	_____	

### education

Person 1 or child

Person 1 or child

education / school	_____	_____
start - end date	_____	_____

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

date of change \_\_\_\_\_ *please attach divorce or separating judgement papers!*

## online transmission of your documents to us



We are happy to accept all documents via email or sharing. Please send us all documents in PDF format. Please do not submit photos; we need the receipts in Adobe PDF format for data processing. To scan receipts with your smartphone, we recommend the various free apps available for iOS and Android. For other transfer methods please contact us (Sharepoint, OneDrive, Transfertools)

 : [info@furtaltreuhand.ch](mailto:info@furtaltreuhand.ch)



## information, notes and questions

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

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Please don't hesitate to ask us for further information:

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