



## CHECKLIST FOR ANNUAL TAX DECLARATION (2019)

### INCOME

- Salary statement(s) for full-time and part-time employment(s) / unemployment accounting(s) / daily allowance settlement(s)
- Balance sheet and income statement (incl. account details) for self-employed activity
- Pension certificates: AHV, IV, pension fund, SUVA, foreign pensions etc.
- Other assets (e.g. art collection, coin collection, precious metals, jewellery etc.)

### BUSINESS EXPENSES

- Fees for public transport 2019 (receipts from train, tram, bus etc.)
- Costs for education and continuing education (receipts, transport expenses and timetables)
- Company vehicle (type: passenger car / delivery van; proportion of external service: note on wage statement or confirmation from employer)

### ASSET

- Statements of all bank and postal accounts (annual statement as at 31.12.2019 with annual interest rate 2019), receipts for lottery winnings (only individual winnings from CHF 1'000.– / original receipt if with withholding tax deduction)
- Tax statements / Deposit account statements (annual statement as at 31.12.2019 with annual income 2019)
- Closing documents of closed accounts in 2019
- Valuation(s) of life insurance(s) as at 31.12.2019
- Vehicles (car/motorbike): purchase price, year of purchase (for leasing: leasing contract)
- Inventory and income from undistributed inheritances: copy of estate inventory / inheritance portion
- Division calculation of inheritances per 2019 / payment date

### DEBTS

- Loans / Mortgage (balance at 31.12.2019)
- Interest paid on debt in 2019

### REAL ESTATE

- Tax valuation of real estate (own and property tax value)
- Net rental income per 2019 (excl. incidental expenses)
- List and copies of invoices for maintenance and renovation work on property paid for in 2019 (incl. building insurance)
- Settlement of condominium ownerships, incl. renewal fund 2019

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**FURTHER DEDUCTIONS / DETAILS**

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| <ul style="list-style-type: none"> <li>- Confirmation of pension contributions paid to pillar 3a and pillar 2 in 2019 (voluntary purchase) <input type="checkbox"/></li> <li>- Receipts of charitable donations and membership fees / donations to political parties <input type="checkbox"/></li> <li>- 2019 receipts for contributions to (limited) incapacitated persons (only if restriction due to health reasons) <input type="checkbox"/></li> <li>- Premium and cost breakdown of the health insurance fund 2019 and any premium reductions <input type="checkbox"/></li> <li>- Self-paid invoices for doctor's and dentist's cost or nursing home invoices and other health care costs <input type="checkbox"/></li> </ul> | <ul style="list-style-type: none"> <li>- Children: Name, date of birth, type and duration of education / school / study; official residence <input type="checkbox"/></li> <li>- Alimony: paid or received alimony in 2019; separated according to children (date of birth / custody / divorce convention) and former partner <input type="checkbox"/></li> <li>- Payment vouchers for the external childcare costs 2019 for the children <input type="checkbox"/></li> <li>- AHV contributions paid for non-employed persons <input type="checkbox"/></li> <li>- Religious denomination <input type="checkbox"/></li> </ul> |
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Please do not hesitate to contact us at any time and for any questions concerning your annual tax declaration.