

Checklist: Documents for your private tax return

General informations

- Copy of previous year's tax return
- Last definitive or provisional tax invoice
- Copy of the cover sheet of the current tax return
- Personal details including date of birth, mail-address, telephone number
- Marital status as of December 31 (marriage, divorce, separation)
- Denomination
- Place of residence (change of canton/immigration from abroad in the tax year: date and previous place of residence).
- Profession of all tax payers
- First names and surnames of the children, school, profession, date of birth

Income:

- Salary statement main employment (workload)
- Salary statement sideline
- Self-employed : annual accounts
- Unemployment, pension, daily sickness benefits, daily accident benefits etc.
- Alimony (separated, divorced / children)
- Apprenticeship contract/confirmation of study (students of age)
- Inheritance, gift, advance inheritance, undistributed inheritance (date, amount, name/address, date of birth of testator/donor, date of death)
- Other income : lottery winnings (if more than CHF 1'000.-)

Securities and income:

- Tax certificates bank/post with capital disclosure as of December 31.
- Account statements for securities etc. with interest / Dividend confirmations
- Asset management costs: custody fees and Bank charges, asset management by third parties

Real Estate and (Switzerland and abroad):

- Imputed real value
- Property tax value
- Date of purchase
- Year of construction
- Rental income
- Administrative costs when renting
- Home Insurance Premiums
- Basic water / rubbish fees
- Effective maintenance costs

Vehicles:

- Purchase date, purchase price and brand (only if no leasing vehicle)

Other assets:

- Insurance value: collections, jewelry, gold, Precious metals etc.

Life Insurance:

- Surrender value

Vorsorge:

- Payments / lump-sum withdrawals Pillar 3a
- Purchase / lump-sum withdrawal of pension fund (2nd pillar)

Professional expenses:

- Public transport subscription
- km driven to the place of work in one's own vehicle
- Number of external meals
- Self-financed training costs
- Membership fees professional associations
- Shift work
- Other professional costs (e.g. work clothes, workspace)

Alimony:

- Certificate of paid alimony (separation / Attach divorce convention)
- Financial support of relatives demonstrably in need , also abroad (enclose receipts)
- Receipts for childcare (daycare, playgroup, nanny, etc.)

Debt and Interest:

- Bank debt / mortgage
- Loan Debt, Lender, Interest Rate
- Other debts (small loans, credit card)

Health insurance:

- Tax statement from the health insurance company (basic and Additional insurance)
- Medical costs borne by yourself (dentist, glasses, Apparatus etc.)
- Certificate of premium reduction received

Donations / contributions to political parties:

- Confirmations

Rental agreement (only Canton Zug)