

Checklist tax declaration

All information are related tot he previous year. Wealth related information as per 31st of december are important.

- Personal information
- Salary statement
- Interest and capital confirmation (Bank and Post) as per year-end
- Custody account statements / if available tax reporting
- Tax value for insurance policies (repurchase value)
- Debt confirmation incl. interest
- 3rd pillar confirmation
- Car (plate (SZ xxxxx), purchase year, price)
- Professional spendings: transport cost
 lunch cost
 education (invoices)
- Life insurance cost
- Health insurance cost
- Invoices for doctor, dentist, lenses / glasses etc.
 (invoices, original receipts)
- donations
- Real estate: Mortgages
 Rental income
 Official rating from «Kantonale Steuerverwaltung»
 Effective cost for maintainance (invoices)
- Copy from last tax declaration