

Checklist: Required documents for tax return

1. General

Taxpayer (Husband and Wife)

last name, first Name, date of birth, religious denomination, occupation, employer, marital status, duty for fire service, possible alimony from former spouse

Children

first name, date of birth, religious denomination, living in the household, duration of education, alimony, charge of foreign support

2. Copy from last years tax return

copy from last years tax return and the tax assesement from last year.

3. Acquisition, alternative and retirement pay

wage statement, alternative salary (ALV, compensation for loss of earning)
business expenses (travel expenses, food, weekly residents, working office, further education, membership fee)
3a-pillar, add-in payments into the second pillar
pension statement

4. Capital earnings, investments

statement of interest, balance of bank accounts, stocks, shares, funds, avtice loans
tax value from life insurance
details from vehicle (year, brand, reinstatement value)
interest and balance confirmation

5. Real estate

tax value, information about real estate (year of construction, purchase date, purchase value)
copy of real estate alimony documents of paid bills
purchased / soled: copy contract

6. Remaining data

donations for non-profit organisation/politically involved parties
cost of sickness (retention/franchise, dentalcost, eyeglass lenses)
cost of handicap
other duties (gift, heirship, assets acquisition)