

**Checklist for the preparation of the tax return**

	<b>Taxpayer</b>	<b>Spouse</b>
Name/Surname	.....	.....
Address	.....	.....
	.....	.....
Telephone	.....	.....
E-Mail	.....	.....
Date of birth	.....	.....
AHV no	.....	.....
Civil status	.....	.....
Profession	.....	.....
Place of work	.....	.....
Religion	<input type="checkbox"/> Roman Catholic <input type="checkbox"/> Protestant <input type="checkbox"/> other <input type="checkbox"/> none	<input type="checkbox"/> Roman Catholic <input type="checkbox"/> Protestant <input type="checkbox"/> other <input type="checkbox"/> none

**Children**

Name/Surname .....  
 Date of birth .....  
 Address (if not living with parents) .....  
 School/education .....  
 Estimated date of termination of current school .....

**Information of the bank account to which tax refunds can be paid**

Owner of the account .....  
 Post-account .....  
 Name of the bank ..... Place .....

No of the account ..... Clearing no .....

IBAN .....

## **Documents and information required regarding your income / wealth in Switzerland and abroad**

### ***General Documents***

- Date of registration in Switzerland if registered during calendar year
- Tax Forms if received (originals)
- Copy of last Swiss tax return filed if any (unless we have filed it)

### ***Salary statements, professional expenses, child care***

- Salary statement(s)
- Pension statement(s)
- Commuting costs from home to work or quantity of kilometres in case the private car is used
- Information if a bicycle is used for the commute from home to work
- Proof of continuous education/seminars costs and other job related expenses which were not paid by the employer
- Proof of costs for external baby/childcare (only deductible if both spouses/single parent have salary/business income)

### ***Real-estate properties***

- Address, information if house or apartment as well as indication of the date of purchase
- Current estimation of tax value resp. hypothetical rental income issued by the community and/or information about the purchase price resp. the current market value
- Information about the rental income
- Information about the maintenance and repairing costs, preferably with receipts

### ***Debts***

- Liability/mortgage statements as of 31 December showing any interest paid during the calendar year and the balance as of 31.12.

### ***Alimonies***

- Alimonies received (personal and for children)
- Alimonies paid to separated / divorced spouse
- Alimonies paid to children

### ***Bank account / shares / assets***

- Year-end statements of all bank-accounts, deposits and financial investments (for example crypto currencies, renewal funds and owner accounts for properties etc.) showing interest received during calendar year as well as the balance as of 31 December (US accounts, i.e. 1099/K-1 statement plus year-end summary overview)
- Information about the amount of cash, gold and other precious metals as per 31 December

**Miscellaneous**

- Confirmation of 3<sup>rd</sup> pillar contributions made, if any
- Confirmation of additional payments into 2<sup>nd</sup> pillar account made, if any
- Details of not covered health costs incl. franchise, dental care costs etc.
- Donations made to charitable institutions and political parties, i.e. Swiss based institutions
- Cars: year of purchase, purchase price (without any reduction through trade in) and brand
- Life policies: Statement showing repurchase value as of 31.12.
- Information about inheritance / gift during calendar year
- Information about capital payments from pension plans

I/we hereby authorize Müller Steuer & Rechtspraxis AG to file my/our tax return, to receive, review and deal with assessments and correspondence from the tax authorities, e.g. request for further documents and final assessment. I/we will then be informed accordingly. The services are charged on a time-spent basis at an hourly rate from CHF 150 to CHF 300 plus VAT and out-of-pocket expenses.

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Place/Date

Signature