

Checklist for the preparation of the tax return

	Taxpayer	Spouse
Name/Surname
Birthdate
AHV no
Denomination	<input type="checkbox"/> Roman Catholic <input type="checkbox"/> Protestant <input type="checkbox"/> other	<input type="checkbox"/> Roman Catholic <input type="checkbox"/> Protestant <input type="checkbox"/> other
Profession
Place of work
Address

Children

Name/Surname	Date of birth	School / education	Estimated date of termination of actual school	Address (if not living with parents)
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Documents and information required:

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
- 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 showing interest received during calendar year as well as balance as of 31 December (US accounts, i.e. 1099/K-1 statement plus year-end summary overview)

Miscellaneous

- Confirmation of 3rd pillar contributions made if any
- Confirmation of additional payments into 2nd 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 130 to CHF 280 plus VAT and out-of-pocket expenses.

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Place/Date

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Signature