

Tax Filing – Relevant Documents for your private tax declaration

Document/Information	Where do I get this?	Status
Full Name and address of you and your partner. Additionally also the date of birth for both.	-	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Additionally we also need an exact description of your profession, e.g. Accountant, IT Specialist a.o. If your partner is also working we need the same information for him/her.	-	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
If you have children, we additionally need name and date of birth as well.	-	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Are your children in a day care? If yes, you should declare the cost for them.	The Swiss tax law accepts a reduction of the taxable income for the costs, you had for the child care (max. reduction CHF 10.000.-). Ask for a payment certificate from your day care to claim this reduction.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
If your employee has hired you only for a specific time period, you most likely fall under the so called Expat-Regulation (ask you employee if this is the case). Then you may also claim the cost for housing abroad and the cost for the school fees for your children.	If you would claim these costs, the employee must state within the salary statement these costs. We can help you to get the relevant information, which will enable you to claim these costs back.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Salary slip for the past year	The salary slip is the base for the tax authorities to estimate your income. Request the salary declaration certificate from your employer. Verify whether all deduction regarding AHV/IV, BVG and Source taxes were done correctly.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done

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Year-end balance of all your banking accounts.	Besides the income tax you also have to pay asset taxes for assets above 100'000.-. Your bank will/has send you a certificate stating the year-end balance of your account(s); it also includes the paid withholding taxes you already paid. Most probably you will also find the cost for carrying the account, which can be also deducted.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
If you have shares, please indicate valor number, qty and whether you have received any dividends.	On capital gains you do not have to pay any taxes but dividends are seen as regular income and are falling under income taxation. Indicate also the return on them and the withholding tax you paid on it. Best you send us a detailed overview of your deposit.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
If you own any property in Switzerland or abroad, you have to declare this in your declaration	Send us the actual "Katasterwert" of the property, in order to estimate the value.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Cost for keeping the property up-to-date.	If you own property in Switzerland or abroad, the virtual rent is added to your taxable income. In order reduce this virtual rent you can deduct any cost you had to pay for keeping the property in shape against this virtual rent. In order to be able to do so, we need all invoices you paid within the taxation period for the property.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
If you have property and you did finance it over a mortgage you can deduct the interest you paid for the mortgage from your taxable income.	Ask your bank to provide an overview about the current mortgage and how much you have paid within the last taxable period.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Provide information about interest payments of any kind of loans and credits.	Also here the interest you paid shall be deducted from your taxable income. This also includes interest payments for your credit card.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done

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Certificate of payments into the 3 rd pillar.	In Switzerland we know the so called three pillar system. AHV, BVG and private pension fund. If you do/did payments into the 3 rd pillar then please send us the certificate of payment. If you have any questions regarding the 3 rd pillar, then please come to us, we will support you in this matter.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Health costs not paid by your health insurance	The costs for health not covered by your health insurance can be deducted from your taxable income. Ask your health insurance to provide you such an overview.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Do you need public transportation in order to get to work?	If yes, when these costs were higher than roughly 800.-and you can proof this with receipts, it makes sense to deduct this also. Keep all your receipt regarding transportation with you, if it goes beyond 800.- then please declare this and send us the receipts.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Did you do any payments to support your relatives (e.g. parents)?	If yes, you can deduct at least a part of it from the taxable income. In order to claim this from the authorities you need to ask your relatives to provide you a statement that they have received money from you. The statement must give clarity about the time span and how much paid.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done
Did you do any other payments to any welfare organization (e.g. Greenpeace, WWF and others)?	See remark above.	<input type="checkbox"/> N/A <input type="checkbox"/> WIP <input type="checkbox"/> Done