

## Data recording tax return

### PERSONALITIES PERSON A

Salutation	<input type="checkbox"/> Mrs	<input type="checkbox"/> Mr
Name	<input type="text"/>	
First name	<input type="text"/>	
Date of birth	<input type="text"/>	
Marital status	<input type="text"/>	
Nationality	<input type="text"/>	
Authorisation	<input type="text"/>	
E-Mail	<input type="text"/>	
Telephone	<input type="text"/>	
Denomination	<input type="text"/>	
Street, number	<input type="text"/>	
Postcode, city	<input type="text"/>	

### PERSONALITIES PERSON B

Salutation	<input type="checkbox"/> Mrs	<input type="checkbox"/> Mr
Name	<input type="text"/>	
First name	<input type="text"/>	
Date of birth	<input type="text"/>	
Marital status	<input type="text"/>	
Nationality	<input type="text"/>	
Authorisation	<input type="text"/>	
E-Mail	<input type="text"/>	
Telephone	<input type="text"/>	
Denomination	<input type="text"/>	

### Existing E-Tax login

<input type="checkbox"/> Yes	<input type="checkbox"/> No
E-Mail	<input type="text"/>
Password	<input type="text"/>

## Data recording tax return

### PERSON A: Main occupation

Profession

Employer

Postcode, place of work

Workload %

Homeoffice  Yes  No

If yes  Mon  Tue  Wed  Thu  Fri

Weekly stay  Yes  No

Way to work  Public transport  
 Car  
 Bike

### PERSON B: Main occupation

Profession

Employer

Postcode, place of work

Workload %

Homeoffice  Yes  No

If yes  Mon  Tue  Wed  Thu  Fri

Weekly stay  Yes  No

Way to work  Public transport  
 Car  
 Bike

### PERSON A: Sideline

Profession

Employer

Postcode, place of work

Workload %

Homeoffice  Yes  No

If yes  Mon  Tue  Wed  Thu  Fri

Weekly stay  Yes  No

Way to work  Public transport  
 Car  
 Bike

### PERSON B: Sideline

Profession

Employer

Postcode, place of work

Workload %

Homeoffice  Yes  No

If yes  Mon  Tue  Wed  Thu  Fri

Weekly stay  Yes  No

Way to work  Public transport  
 Car  
 Bike

### Relevant documents for gainful employment:

- Salary statements for all income
- If staying for a week: copy of rental contract, including rent, additional costs and address of residence
- If travelling to work by public transport: receipts or details of route or tariff subscription
- If commuting to work by car: employer's certificate of professional necessity (if available), vehicle registration document incl. year of purchase, catalogue price and purchase price (if not leased). (Please note that the cantonal tax authorities only accept the deduction for travelling to work by car under certain conditions)

## Data recording tax return

### PERSON A: Training or further education (self-financed)

Type of training

School

Postcode, school

Number of days

Training up to

Way to school  Public transport

Car

Bike

### PERSON N: Training or further education (self-financed)

Type of training

School

Postcode, school

Number of days

Training up to

Way to  Public transport

Car

Bike

### Relevant documents Education or further training (self-financed):

School confirmation

Invoice for semester fees/monthly fees for training or further education

Receipts for material costs

Receipts for travelling: e.g: Receipt for routes or travelcard (analogue to relevant documents for gainful employment)

## Data recording tax return

### Children

---

Name

First name

Date of birth

Third-party support  Yes  No

In training  Yes  No

In the same household  Yes  No

Company/School

Training until

---

Name

First name

Date of birth

Third-party support  Yes  No

In training  Yes  No

In the same household  Yes  No

Company/School

Training until

---

Name

First name

Date of birth

Third-party support  Yes  No

In training  Yes  No

In the same household  Yes  No

Company/School

Training until

Name

First name

Date of birth

Third-party support  Yes  No

In training  Yes  No

In the same household  Yes  No

Company/School

Training until

### Relevant documents Children:

- Receipts for third-party childcare costs
- School confirmation for adult children
- Invoice for semester fees/monthly fees for education costs for children

## Data recording tax return

Ex - Partner A \_\_\_\_\_

Name

First name

Date of birth

Street, No

Postcode, city

Alimony  Received  Paid

Child maintenance  Received  Paid

Ex - Partner B \_\_\_\_\_

Name

First name

Date of birth

Street, No

Postcode, city

Alimente  Received  Paid

Child maintenance  Received  Paid

### Relevant documents in the event of divorce:

- Divorce certificate
- Account statements for monthly alimony paid or received
- Bank statements for monthly child support payments paid or received

PERSON A: other assets \_\_\_\_\_

Property

Vehicle

Shares

Cryptocurrencies

Cash

Painting

Other

PERSON B: other assets \_\_\_\_\_

Property

Vehicle

Shares

Cryptocurrencies

Cash

Painting

Other

### Relevant documents for other assets:

- Cadastral extract property/cantonal valuation property incl. tax value and imputed rental value state and federal government
- Mortgage interest statement (if available)
- Statement of rental income (if the property is rented out)
- Receipts for maintenance of the property (if the actual costs exceed the flat-rate deduction)
- Vehicle registration certificate incl. year of purchase, catalogue price, purchase price and current value
- Certificate of trading and/or ownership of shares
- Account statements and/or receipts for trading and/or ownership of cryptocurrencies
- Other documents certifying the current value of other assets

## Data recording tax return

### General documents

- Tax return (Cover sheet)
- Copy of the last tax return submitted per person
- Copy (front and back) of the last definitive assessment decisions per person
- Details of the deadline extension, if one has been entered

### Employment and pension income, professional expenses

- Wage statements for main and secondary occupation
- Information on VR fees, if available
- Definitive closure of the sole proprietorship
- Receipts for lottery winnings
- Alimony / maintenance payments received
- Certificate of Income replacement, maternity and nemployment insurance daily allowances and insurance daily allowances
- Are there any professional expenses that are not recognised on the salary statement (home office, training costs, etc.)? If yes, please enclose receipts
- Other professional expenses (underground travelcard, car commute per day in kilometres)
- For weekly stays, please enclose the following documents: actual travel costs for the weekly return to the family home, proof of rental costs including utility bills (limited to the usual local costs for a 1-room flat including utilities) and proof that there is no possibility of catering in the flat

### Securities, bank balances, loans / declaration of gifts and inheritances

- Interest and balance confirmations at the end of the tax period (or until cancellation)
- Proof of credit balances of cryptocurrencies
- Evidence of asset management costs
- Any information on loans (incl. loan agreement)
- Any information on current accounts in the company (account sheets)
- Have any inheritances been received? If yes, inventory of inheritance and details of division
- If capital was paid out from a pension account (Pension fund or private pension plan)
- Have you received or made any gifts? If yes, to whom, what.

### Information on properties

- Sheet on the imputed rental value and the property tax value from the tax administration, also for foreign properties (as at the end of the tax period)
- Purchase contract and details of when the flat/house was occupied
- Information on any rental income
- Property maintenance costs with receipts (Please provide a copy of all receipts so that they can be sent along)
- Settlement regarding condominium ownerships
- Copy of the subsidies received for energy and environmental protection measures / feed-in tariffs for photovoltaic systems

### Mortgages, other debts

- Interest and debt confirmations at the end of the tax period (mortgages, credit cards, etc.)
- Interest on arrears is also deductible
- Illness, accident and disability costs
- Confirmation from the health insurance company about deductibles including details
- Receipts for directly paid costs such as dental costs, glasses, care costs, etc.

### Other deductions

- Confirmations of deposits in the 3rd pillar
- Pension fund certificate (purchase contributions)
- Voluntary contributions/donations; receipts/vouchers (possibly also membership of a political party)
- Costs for childcare by third parties / information on alimony
- Receipt of paid AHV contributions (non-employed persons)

### Assets

- Surrender values of life insurance policies
- Information on other assets such as vehicle (list of type, year, purchase price), precious metals, collections, relevant cash holdings, etc.)

## Data recording tax return

### Order provisions

The client hereby instructs the named financial service provider to process the tax return and to draw attention to any opportunities for tax optimisation and general financial optimisation.

The service provider is subject to the guidelines of FINMA (Swiss Financial Market Supervisory Authority), the Swiss Tax Act and the Swiss Insurance Supervision Act, as well as the guidelines of the AMLA (Money Laundering Act).

The client also confirms (**please tick**):

- not to be a US person, nor to have connections such as assets, income, bank accounts, real estate in and/or from the USA. (For orders for US persons, please complete, sign and enclose the US tax order form);
- to have enclosed all required and available documents in accordance with the checklist.

### Disclaimer, data protection and costs

The client is responsible for the accuracy of the information in his/her tax return, and the financial service provider therefore rejects any responsibility and liability.

The financial service provider is not liable for any damage or incorrect information under any circumstances.

The financial services provider accepts no responsibility for incorrect advice or incorrect advice due to forgotten or unsubmitted documents.

The financial service provider treats all information and documents confidentially in accordance with the Swiss Data Protection Act (DSG).

***The client has read the terms and conditions and declares that he/she agrees to them with his/her signature. The client hereby confirms that all information provided and to be provided in the future is true and correct***

Place, date

Signature