

## Checklist for the 2021 tax return

### Taxpayer:

Name:	First name:
Complete address:	Date of birth:
E-Mail:	Phone number:
Religion: Roman Catholic <input type="checkbox"/> Christian Catholic <input type="checkbox"/> Reformed <input type="checkbox"/> Jewish community <input type="checkbox"/> Others <input type="checkbox"/> No religion <input type="checkbox"/>	
Marital status since: _____ single <input type="checkbox"/> married <input type="checkbox"/> separated <input type="checkbox"/> divorced <input type="checkbox"/> registered partnership <input type="checkbox"/> widowed <input type="checkbox"/> PACS <input type="checkbox"/>	
Since when do you live in Switzerland?	

### Taxpayer's partner or spouse:

Name:	First name:	Date of birth:
Complete address:	Since when does she/he live in Switzerland?	
Religion: Roman Catholic <input type="checkbox"/> Christian Catholic <input type="checkbox"/> Reformed <input type="checkbox"/> Jewish community <input type="checkbox"/> Others <input type="checkbox"/> No religion <input type="checkbox"/>		

### Minor or children in training for whose maintenance you are responsible:

Name:	First name:	Date of birth:
Complete address:	Since when does she/he live in Switzerland?	
School / Training company / University, etc.	Expected end of training:	
Religion: Roman Catholic <input type="checkbox"/> Christian Catholic <input type="checkbox"/> Reformed <input type="checkbox"/> Jewish community <input type="checkbox"/> Others <input type="checkbox"/> No religion <input type="checkbox"/>		

Name:	First name:	Date of birth:
Complete address:	Since when does she/he live in Switzerland?	
School / Training company / University, etc.	Expected end of training:	
Religion: Roman Catholic <input type="checkbox"/> Christian Catholic <input type="checkbox"/> Reformed <input type="checkbox"/> Jewish community <input type="checkbox"/> Others <input type="checkbox"/> No religion <input type="checkbox"/>		

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**Income** (01.01.2021 – 31.12.2021)

- Annual salary statement and monthly pay slips
- Information (annual financial statement, accounting, etc.) in connection with self-employment
- Annual income statement of social securities (e.g. unemployment benefit, pension, daily allowance, etc.)
- Proof of maintenance payments (alimony) *from* divorced/separated spouse for yourself and/or children (including copy of the complete separation and/or divorce agreement)
- Information about further income values

**Deductions** (01.01.2021 – 31.12.2021)

- Information about the working place:

Place of work (complete address):	Workload with corresponding days of the week (if not 100%):
Use of vehicle: <input type="checkbox"/>	Use of public transportation: <input type="checkbox"/>
Single way: _____ km	Type of subscription: _____
Trips per day: 4 <input type="checkbox"/> / 2 <input type="checkbox"/>	Price: _____
Reason for the use of the vehicle:	(Please provide us with the corresponding receipts)
<input type="checkbox"/> Time saving (in comparison with public transportation) of at least one hour per day <input type="checkbox"/> Lack of a public transportation <input type="checkbox"/> Vehicle required for work (employer certificate) <input type="checkbox"/> Health reasons (medical certificate)	

- List of costs for professional training, further training and/or retraining (not reimbursed by the employer); incl. travel and meal expenses
- Proof of maintenance payments (alimony) *to* divorced/separated spouse and/or children (including copy of the complete separation and/or divorce agreement)
- Confirmation of voluntary pension contributions to pillar 2 and/or pillar 3a
- Proof of the contributions to AHV/IV/EO for non-employed
- Supporting documents for expenditure on outside care (e.g. crèche, nanny); incl. travel expenses
- List of contribution to charitable institutions and political parties (based in Switzerland)
- Proof of asset management fees
- Proof of paid passive/debit interests (cf. debts)
- Supporting documents of health expenses and disability-related costs (if > 5% of the taxable net income) paid by yourself
- Proof of payment for support to third parties (e.g. parents) with the following information:

Name:	Address:	Date of birth:
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- Copies of the passports of the financial supported third parties as well as certificate of the need of support of the third parties in German language (by the Swiss Consulate or the municipal authority of the residency of the supported person)

### Debts (per 31.12.2021)

- Statements of interest paid and balances of all (worldwide) outstanding debts (mortgages, loans, consumer credits, etc.)

### Asset (per 31.12.2021)

- Statements of interest received and balances of your bank and post accounts
- Tax statements of your bank deposits *or* ...
- ... Proof of securities portfolio incl. statements of interest/dividends/sales/purchases
- Details of your employee profit sharing (employee participation)
- Details of your private loans
- Are you partner/owner of a company? If yes, please let us know. We will inform you about the necessary information.
- Confirmation of the surrender/buyback value (*amount which you would receive back if you cancel the life insurance*) of your life insurances
- Information about the private vehicle (not applicable for leased cars or company cars)

Year of construction:	List price:	Make of vehicle:
Year of purchase:	Purchase price:	

- Information about further asset values (e.g. crypto currencies, gold bullion, art collection, lottery win, etc.)

### Real estates

- Official valuation of your real estate(s) in Switzerland and abroad as well as:

Tax value:	Rental income: (incl. details about gross and net income)	Hypothetical/fictive rental income:
Purchase price:	Year of purchase:	Year of construction:

- Invoices for the maintenance of your real estate(s), financial statements in connection with condominium and co-ownership
- Information about balance renewal fund, asset share in condominium ownership
- Information about rights of usufruct and/or abode

### Additional information

- Information about received/made donation and inheritance (incl. undistributed inheritance):

Name:	Degree of kinship:
Address:	Amount and date:

- Information (date, amount, statement) about received capital payments in connection with pillar 2 and/or pillar 3a, one-time premium insurance, life insurance, etc.
- List of non-taxed income and assets, which you possibly would declare for subsequent taxation
- Account details for the payback of a possible tax credit:

Bank:	Account number:	IBAN:	Account holder:
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**Important note:** The worldwide income and the worldwide assets have to be declared!