

## CHECKLIST for your tax declaration

### Expenditures

**1. Professional expenses " travel expenses " to the workplace :**

Monthly subscription or kilometers traveled per day, to be only one way

**2. Professional expenses " professionally necessary work materials " costs about CHF 1'900 - . :**

Invoices and receipts for these expenses

**3. Professional expenses " training " costs above CHF 500 - :**

Invoices and receipts of the school , books , materials , subscription , meals on school days

**4. health insurance :**

Police or receipt for premiums paid.

**5. Life Insurance:**

Confirmation of the surrender value, or policy

**6. Life insurance 3 Column a:**

Confirmation of Insurance

**7. Shopping in the second Column ( pension fund ) :**

Shopping confirmation

**8. Bank credit , loans from individuals or Mortgage:**

Credit card, contract with confirmation of interest received , Hypothekarzinsausweis

**9. Credit card holders :**

Interest settlement / ID card for any credit cards.

**10. Property Owner:**

Maintenance costs of the renovation , repair

**11. Child support payments to children, ex-husband or separated spouses :**

Debit or confirmation of the partner

**12. Self Paid OASI contributions (with people unable to work or self-employed ) :**

Receipts or debit the bank

**13. Donations to charities and party posts :**

Receipts or debit the bank

**14. Self Paid medical expenses for yourself, spouse , children, or people supported :**

Invoices / receipts , dental bills , payroll deductible health insurance

**15. From you supported financially needy family members :**

Bank or postal receipts and supporting proof of residential community

**16. Children in Education:**

Apprenticeship contract , school confirmation

**17. Care costs of foreign children in care :**

Hort or cribs bills or private person of a confirmation

**18. Children living outside of your home :**

Bank or post office receipts for the maintenance payments.

## **CHECKLIST for your tax declaration**

### **Income:**

**1. Income from main occupation and part-time :**

salary certificate

**2. Income from unemployment insurance :**

salary certificate

**3. Daily allowances of health and accident insurance or pension benefits:**

daily allowance certificate

**4. Pensions for old age, invalidity , pension and accident insurance:**

pension certificate

**5. Capital payments AHV , IV, BVG or the employer:**

Capital payment letter

**6. Received child support for children or for yourself :**

Credit note of the bank or signed confirmation of the ex-spouse .

**7. Rental income from leased properties :**

Credit notes and lease

**8. Self Occupied Property :**

Estimation of the community

**9. Income from bank deposits or loans receivable :**

Bank statements ( bank, post office ) 31.12 ; . Interest statements of accounts ; loan agreement with interest credits

**10. Income from shares, bonds, investment funds :**

Dividend statements , coupon accounting , purchasing and sales documents and deposit statement 31.12.  
(or only tax statement , bank charges fees!)

**11. Winning the lottery :**

Profit as presented in the lottery company

**12. Income from inheritances ( also not yet distributed inheritances ) :**

Revenue recognition ( contract of inheritance )

**13. For other not mentioned here income:**

Corresponding letters and documents

### **miscellaneous**

1. car: Model, Year of purchase, purchase price.

## **REMEMBER :**

**PLEASE SUBMIT A COPY OF YOUR  
PREVIOUS TAX DECLARATION FORM**