

Tax Return

Checklist Swiss income tax returns

Resources

If available, Completed Tax Return of foreign country for the previous year

Income

Employed individuals	Salary certificate(s)
Self-employed individuals	Annual accounts or statement of revenues and expenditures
Alimony/maintenance recipients ments	Details of alimony/maintenance pay-
Other incomes	detailed List of other incomes

Deductions

Employed individuals	Travel costs: distance by car (km) or receipt of travel pass (train or bus); invoices for continuing education courses; proof of payments made to 3rd pillar a) pension scheme or to purchase additional 2nd pillar company pension benefits
Health- and Accident-Insurance	List of all premium for Health- and Accident-Insurances paid
Doctors costs	list and invoices of all doctors costs self payed
Alimony/maintenance payers Parents	Receipts for alimony/maintenance paid Receipts for crèche/day care fees paid or other costs in connection with children being cared for by others
Support payers	Support payments to dependants in need

Disabled and care-dependant individuals

Proof of health care expenses (health insurance deductibles, dentist, ophthalmologist, optician)

Donors

Proof of financial contributions to charities or political parties

Real estate

Owner-occupied real estate

Notification by tax office of estimate of taxes payable

Rented out real estate

Rental income

Maintenance and repairs

Invoices

Other assets

Securities and deposits

End of the year statements of postal and bank accounts, bonds, fund units, shares or loans; loan agreement for private loans, confirmation of interest

Equity investments

List of Equity **directly** held, company name, share capital, quota, financial statement, Dividends

Life insurance policies

Insurance statement or policy

Inheritance and gifts

Address of deceased/donor, amount and date of inheritance/donation

Motor vehicles

Make, purchase price, year of purchase

Other property

Boats, collectibles (e.g. paintings or jewellery), precious metals, etc.

Liabilities

Mortgages, Loans from private individuals

Statements of creditors showing the amount of the debt per end of year and proof of payment of interest on loan