

Documents

General documents

- Original forms containing the newest tax information (incl. cover sheet)
- Copy of the last tax statement (with attachments: only for new customers)
- Last tax assessment / tax invoices (final tax invoice for the previous year, provisional invoice for the current year)
- Notice of assessment (state and municipal taxes) for the previous year
- Notice of assessment (direct federal taxes) for the previous year

Main documents

Income:

- All salary and wage statements (main and sideline occupation, incl. child benefits and management fees)
- AHV (national insurance) and pension certificate
- Loss of earnings compensation (EO), maternity allowance and unemployment insurance (ALV) certificates

Other documents:

- 3a scheme pension insurance certificate (incl. spouse)
- Professional pension (BVG) insurance certificate [purchasing of pension benefits] (incl. spouse; only if not declared in the salary/wage statement)
- Proofs of child support and alimony payments incl. the address of the recipient: divided in child and spousal support payments (received / made)
- Payment slips for insurance fund (AHV) contributions, paid by you
- Overview of donations made and supporting receipts
- Overview of political party contributions and supporting receipts

For self-employers:

- Balance sheet, income statement and attachments (all signed)
- Statements of assets and liabilities, revenue and expenditures as well as of private withdrawals and contributions for tax-liable entities with simplified accounting
- Statements of write-offs or provisions
- Form for stating liquidation gains upon discontinuation of self-employment (if applicable)



Documents

Work-related expenses

- Travel expenses of 2019 (season ticket, route to work in kilometers)
- Payment slips for accommodation / meals for a week's and longer stays abroad
- Do you eat out at work?

Husband / Person 1

Yes No

The expenses on meals are partly covered by the employer

The expenses on meals are covered entirely by me

Wife / Person 2

Yes No

The expenses on meals are partly covered by the employer

The expenses on meals are covered entirely by me

- If you have a company vehicle, please state whether it was used for private needs

Yes No

- If a private vehicle was used for business needs, please provide a confirmation from the employer

- Overview of educational expenses over CHF 400 a year and supporting receipts (incl. specialized literature)

- Rent expenses (for the working from home)

- Contributions to professional associations

Securities directory

- Bank receipts or interest rate statements for all cash accounts as of 31 Dec. 2019
- Account closure confirmations for the accounts closed in 2019
- Details of other personal loans and interest rates as of 31 Dec. 2019
- Securities and deposit statements of 2019 or tax inventory checklists (are issued at the bank)
- Proofs of lottery wins (incl. lottery, betting or other entries)

Property directory

- For owner-occupied family houses or story ownerships: official value and imputed rental value
- Rent expenses without heating and other utility costs: details for each property
- Property maintenance bills (incl. land taxes, building insurance, chimney sweeping, replacement costs etc.): details and payment slips for each property
- Copy of the official market value estimate for each property; copies of all purchase or sale contracts



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abrechnungen.ch
Flurstrasse 30
8048 Zürich
info@abrechnungen.ch
044 585 22 72

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Debt directory

- Debt and mortgage interest statements as of 31 Dec. 2019
- Details of other personal debts and interest rates as of 31 Dec. 2019 (e.g., outstanding invoices as of 31 Dec. 2019)

Insurance directory / Healthcare and emergency expenses / Disability costs

- Overview of annual health insurance premiums and expenses of 2019
- Life insurance and private accident insurance premiums
- Details of health insurance premiums (please provide a copy of 2019 insurance policy if possible)
- Receipt for health insurance premium reductions of 2019
- Details and payment slips for healthcare expenses (health service deductibles, dental or optical bills etc.)
- Details and payment slips for disability costs (if not undertaken by third parties), type of disability and the amount of helplessness allowance

Assets within and without the country

- Certificates from insurance companies stating endowment and single premium amounts to be redeemed under the insurance policy: redemption value as of 31 Dec. 2019
- Private vehicle fleet overview: with details on car brand, year of purchase, purchase price
- Overview of undistributed inheritances and their worth: copy of the inheritance inventory and inheritance distribution statement
- Asset values (cash, gold ingots, boats, coin collection, precious metals, jewels etc.: please provide a complete list)

Other details for the tax declaration

- Receipts of capital payments under the 3a insurance scheme, pension insurance, accident and liability insurance
- Receipts for all capital payments under the life insurance
- Inheritance shares of 2019 (inheritance share calculations / payment date)
- Gifts / inheritance benefits of 2019



General Questions (Husband / Person 1)

What is your current occupational status?

Employed (employee, shareholder in the employing company)

Self-employed (sole proprietorship)

Combining employment and self-employment

I am a student

I am retired

I am unemployed

If you are currently unemployed, have you been unemployed during the fiscal year 2019?

Yes, during the whole fiscal year 2019

No, only in period from _____ to _____

Please indicate any changes in the personal details you stated (if relevant):

Relocation

Moved from

to

New Address

Civil status

Marriage

Divorce

Separation

Addition(s) to the family / Child(ren) no more living at home

First, last name

Date of birth

Address

First, last name

Date of birth

Address



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General Questions (Wife / Person 2)

What is your current occupational status?

Employed (employee, shareholder in the employing company)

Self-employed (sole proprietorship)

Combining employment and self-employment

I am a student

I am retired

I am unemployed

If you are currently unemployed, have you been unemployed during the fiscal year 2019?

Yes, during the whole fiscal year 2019

No, only in period from _____ to _____

Please indicate any changes in the personal details you stated (if relevant):

Relocation

Moved from

to

New Address

Civil status

Marriage

Divorce

Separation

Addition(s) to the family / Child(ren) no more living at home

First, last name

Date of birth

Address

First, last name

Date of birth

Address



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