

Checklist for documents needed for tax declarations (privat persons)

- Your last tax declaration (if not made up by our company)
- New tax forms

Concerning income

- Wage statement
- Child support
- Pension certificates AHV (old age insurance system), IV (disability insurance), SUVA (Accident insurance), PEKA (pension fund)
- Daily allowances for unemployment, illness or accident
- Winnings of Lotto and Toto
- Any inheritances and gifts (please do not forget name and degree of relationship)

Concerning wealth

- Annual accounts of your bank and/or post office accounts as per 31.12.
- Depository account statements or tax register as per 31.12.
- Tax surrender values of life insurance policies
- Other assets such as motor vehicles

Concerning debts

- Credit card balance including interests
- Personal credit balance including interests

Concerning medical expenses

- Patient's contributions to your private health insurance
- Health insurance premiums (except Kt. AG)
- Dental costs
- Medical bills, which were not covered by your health insurance

Concerning disability-related costs

- Medical certificate (only the 1st time)
- Tabular overview of the expenses and refundings
- Costs nursing home for the elderly

Concerning deductions

- Commute (public transport or amount of km for motor vehicle)
- Costs for education
- Provided donations and party posts
- Professional associations
- Costs for foreign care of your children (nursery, childminder, day care centre)
- Child support
- Supported persons (exact details, documents)
- Extraordinary purchase into the pension fund (2nd pillar)
- Piece of documentary evidence of amounts paid to 3rd pillar
- All information on persons, who are living in your household (incl. AHV- resp. SVA numbers)

Additional documents in case of property ownership

- Assets of your property or land
- Imputed rental or rental income
- Mortgage amount and interest
- List or receipts regarding management, maintenance, renovation, repairs