

**artax tax checklist for tax declarations**

This ensures that we have the complete information relevant for Swiss taxation

If you have been taxed before in Switzerland, please send us a copy of your last tax declaration as well as the last tax assessment.

**Personal information:**

**Spouse/Partner**  married/registered  unmarried

<b>Last name:</b>	Last name:
<b>First name:</b>	First name:
<b>Address:</b>	Address:
<b>Postal Code, Residence:</b>	Postal Code, Residence:
<b>Date of birth:</b>	Date of birth:
<b>Date registration residence in CH:</b>	Date registration residence in CH:
<b>Denomination (church membership):</b>	Denomination (church membership):

**Children:** YES  NO  Number: \_\_\_\_\_

Last name:	First name:	birth:	School:
Last name:	First name:	birth:	School:

Please indicate if different residence: \_\_\_\_\_

**Income and Wealth Information**

- Income from job (salary statement or income from self-employment)
- Bank statements of all accounts Switzerland **and abroad** (incl. rental deposit, accounts opened or closed during the year): balance on 31.12., interest earned, fees paid
- Securities portfolio (shares/bonds/funds etc.) and investments **worldwide**: balance at 31.12., interest and dividends
- Real estate income, or legal right to use of property **worldwide, including self-used property** (Please indicate location / address, year of construction and tax value / market value)
- Income from insurances, Pension income (Social security, accident and disability, annuities)
- Life insurances: statement showing redemption value on 31.12. (pure risk insurances are not tax relevant)
- Capital / lump sum payment from insurance or pension plan
- Income from other activities (board of director's fees, patents, royalties, etc.)
- Alimonies received/paid (divorce papers, court order, name, address from receiver/payer)
- Gifts or inheritances received or made (personal data, relationship), undistributed estates
- Lottery prizes
- Income from job or self-employment of spouse/reg. partner **worldwide** (e.g. Swiss salary certificate)
- Other income even if not sure whether taxable

**Possible deductions**

- Medical expenses not covered by insurance (healthcare insurance annual statement, dentist bills)
- Contribution to private pension scheme (pillar 3a)
- Extra contributions company pension scheme (second pillar, not including regular monthly deductions)
- Childcare expenses (deductible if both partners are employed)
- Financial support dependents (personal data and relationship, official confirmation of dependency, proof of payments)
- Work-related costs (self-paid educational costs. Other deductions in special situations to be discussed)
- Contributions to charity or political parties
- Bank charges, wealth management expenses
- Real estate maintenance costs and management fees
- Mortgage, amount owed on 31.12., interest paid worldwide
- Loans: amount owed on 31.12. and data of lender, interest paid

**Other general information and remarks**