

Checklist for Swiss individual tax return

To be able to fill out your tax declaration accurately we kindly ask you to submit the following Information and documentation where it is applicable.

In Switzerland, your global income and assets are taken to determine your tax rate. Foreign income and assets are not subject to tax in Switzerland, however they need to be declared. Any deductions claimed need to be backed by a document. Don't forget credit card statements and other debts as interest paid offsets taxable income and debts are subtracted from taxable equity.

Documents

- First page of your tax declaration received from your municipality / Gemeinde
- A copy of the last tax assessment issued by the tax department
- A copy of the last return filed, unless filed with Aconta GmbH
- Copy of your permit or passport
- Salary certificates / Lohnausweis from all your occupations as well as your spouse
- Statements of pensions of other **income** received:
 - AHV
 - ALV / Unemployment insurance
 - UVG / Accident insurance / Suva
 - BVG / Pension fund (retirement income received)
 - KVG / Health insurance
 - KTG / Salary insurance
 - IV / Disability insurance
 - Honorariums
- Receipts detailing expenses for further education tied to your occupation and other work-related expenses
- Receipts of donations made
- Statements of special contributions to your occupational or private pension fund (2nd pillar or 3rd pillar) that **do not** appear on your salary certificate
- Statements detailing alimony or lump-sum settlements (UVG/BVG)
- Summary from your health insurance detailing insurance rate paid and deductible paid
- Summary of other medical expenses **not** covered by insurance **or** not claimed with the insurer
- Any notable **change** in assets (purchase or sale)
 - Car
 - Life insurance
 - House
 - Other _____
- Inheritance of gifts received or given If yes, to/from _____
- Cost of childcare (submit receipts)
- Details of alimony / child support paid or received

