



## Required documents:

- Original tax form
- Copy of the last tax return

## Income:

- Statement of wages / income of self-employed persons
- Pension certificate (AHV, IV, SUVA, pension fund)
- Daily allowances for unemployment, sickness, accident
- statement of alimony received
- Other income (e.g. lottery winnings from CHF 1'000)
- Lump-sum benefits from pension plans
- Inheritance / anticipated inheritance / gift

## Assets/liabilities:

- Interest and capital statements from bank accounts (at 31.12.XX)
- Interest and capital statement of debts (e.g. credit cards, consumer credit, mortgage etc.)
- Statement of securities account / List of assets / List of securities (as at 31.12.XX)
- Tax certificate of life and pension insurance

## Deductions:

- Contributions to insurance funds (health insurance, IV, accident & life insurance contributions)
- Contributions to pension schemes (2nd & 3rd pillar)
- Costs of vocational education and training (including retraining)
- Donations/Party contributions
- medical and nursing costs (not covered by insurance)
- Two-earner deduction if both spouses are gainfully employed
- Deduction of third-party care costs
- Statement on alimony payments

## Property owners:

- Tax and imputed rental value
- Mortgage tax certificate
- List or supporting documents Administration/maintenance/renovation/repair
- Contract on purchase/sale

## Waiting time/period:

At present our processing time is about 2-4 weeks. The deadline for the submission of tax documents is usually on 31.03. A possible extension of the deadline for the submission can therefore be given if we also apply for it (Important: the deadline for objection in case of wrong tax assessments is only 30 days)