

check list for tax declaration 2021

Your tax return can be completed competent, if you collect your documents completely:

Please use **NO staples**, your documents are scanned!



Please find details to the COVID-19-situation at the back.

General / Information / Formulas

- Originals of tax return (received from municipal tax office, DIN A3 folded)
- new costumers: Copy of last year's tax return
- Any civilian changes in comparison to previous year (details next page)
- Information from children, you support financially (details next page)
- Tax certificate of withdrawal from 2nd or 3rd pillar 2021 (lump-sum benefits)
(e.g. for purchase of property, start a business, leaving CH and EU/EFTA, case of death, etc.)
- Information about inheritances and financial gifts received or given 2021 (statements needed)
- Undistributed inheritances (inventory control, account statements, etc.) / worldwide

Income / Switzerland and worldwide

- Salary statement / s,main and subsidiary income, all of 2021 (if more than one employer) *
- Tax certificate of received pensions from AHV or IV, Switzerland or worldwide
- Tax certificate for received unemployment benefits/allowance (ALV)
- Tax certificate of social security and insurance daily benefits/allowance from accidents or disease
- Alimonies and annuity contributions paid or received from or paid to separated / divorced spouse and children
- Other income (z.B. daily benefits, VR fee, fire brigade, private pensions, life insurance etc.), please specify

Deductions / Switzerland and worldwide

- Transportation expenses from home to place of work (train, bus, bicycle, car, etc.) / driven kilometres
- Confirmation for payments into 2nd/3rd pillar (life insurances) and purchase of pension benefits
- Professionally-related training / retraining, further education costs (paid in 2021), professionally-related
- Schedules, expenses, parking-fees, travel-expenses for advanced training, professionally-related
- Tax certificate health insurance (please ask for, if not automatically received)
- Copies of invoices of self-paid health cost, such as dentist or physiotherapy, etc.
- Charitable donations for Swiss registered companies (if overall more than CHF 300.- a year)
- Other deductions (such as non employe contributions, extraordinary expenses, etc.)

Asset and Debts / Switzerland or worldwide

- Bank account statements at 31.12.2021 / tax certificates of interest and dividends / closing statements
- US-Accounts: 1099/K-1 statement plus year-end summary overview
- Tax reports for Switzerland of your security deposits (please ask your bank), Switzerland or abroad banks
- Lottery profits, if withholding taxes deductet (original document needed)
- Confirmation of paid interests of debts 2021 (mortgage, private loans, bank loans, credit cards, etc.)
- Car/s & motorbikes & ships (brand, acquisition year, purchase price), Leasing? Yes No
- Repurchase value of certificates from life and pension insurance (3rd pillar b)

Child care costs

- Child care costs (ask for a tax certification or annual overview) , for double-income earners and single parents

Real estate owner / Switzerland and worldwide

- Tax information about rental value of your property (your tax authority will provide a sheet)
- if rented out: rental income and tenant names, monthly rent (net and gross), specify vacancies
- Maintenance, operational and administrative costs (copies of receipts, invoices, etc.)
- Summary of maintenance, especially for floor owner (ask your property management for it)
- Tax certificate for paid debt interest (mortgage and other, from your bank)

Additionally for self-employed

- Balance sheet & income statement 2021, if not done by us
- Documents for all further expenses (such as telephony, mobile, internet, advertising, etc.)

NOTES



changes personal data in comparison to previous year

(qualifying date: December 31st 2021)

	Person 1	Person 2
family / given names	_____	_____
civil status	_____	_____
confession	_____	_____
employer	_____	_____
job title	_____	_____
job location	_____	_____
company car owner: mainworkplace	_____	_____

further changes in comparison to previous year

birth of a child

family / given name	_____	_____
date of birth	_____	_____
address	_____	

education

Person 1

Person 2

education / school	_____	_____
start - end	_____	_____

civil changes (wedding, case of death, divorce, separation)

date of change _____ *please attach divorce or separating judgement papers!*

* Covid-19-Information

Please explain, what your impact was during 2021's pandemy. (home office, short-time work, quarantine)
Cantonal guidelines can be handled different. (as of 31st of Dec. 2021 there were no given guidelines of any canton)

information, notes and questions

(such as emplye-changes, alimony, inheritance, property maintenance information, questions, need-to-knows, etc.)

Please don't hesitate to ask us for further information:

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