



## Checklist of receipts for the Tax Return

### General

- ☐ Last tax return (only for new customers)
- ☐ Online code / Current tax return forms

### Income

- ☐ Wage statement(s)
- ☐ Alimony (incl. personal/children statement)
- ☐ Pension certificates (AHV, IV, SUVA, PK)
- ☐ Daily allowances from unemployment, illness, accident
- ☐ Lottery and pool winnings

### Assets

- ☐ Bank statements as at 31.12.
- ☐ Investment and portfolio tax statements as at 31.12.
- ☐ Life insurance as at 31.12. (repurchase values)

### Property owners

- ☐ Tax and imputed rental value
- ☐ Mortgage amount and interest
- ☐ Statement or receipts Administration / Maintenance / renovation / repairs

### Debts

- ☐ Credit card balance with interest
- ☐ Private loan balance with interest

### Medical expenses

- ☐ Health insurance extract/statement
- ☐ Dental treatment costs

### Disability-related costs

- ☐ Medical certificate (only for the 1st time)
- ☐ List of expenses/allowances
- ☐ Nursing home costs

### Deductions

- ☐ Commuting to work (public transport, car-km)
- ☐ Further education
- ☐ Donations, party contributions
- ☐ Pillar 3a, purchase of 2nd pillar
- ☐ Health insurance premium
- ☐ Childcare costs (after-school care, childminder, nursery, nanny)
- ☐ Supported persons (exact details, receipts)