

Checklist for Tax Declarations 2022

<input type="checkbox"/> Ms	Person1	<input type="checkbox"/> Mr	<input type="checkbox"/> Ms	Person2	<input type="checkbox"/> Mr
Surname & Firstname:			Surname & Firstname:		
Street, No.:			Street, No.:		
ZIP code, City:			ZIP code, City:		
Religion:			Religion:		
Profession:			Profession:		
Working Place:			Working Place:		
Marital Status:			Marital Status:		
Phone Number:			Phone Number:		
e-Mail:			e-Mail:		
Name child 1:		DOB:	Name child 3:		DOB:
Name child 2:		DOB:	Name child 4:		DOB:

(For children in education, please provide details of school or training position and **remaining time**)

Required documents for the tax year 2022 (all as of 31.12.2022 and worldwide)

IMPORTANT	<input type="checkbox"/> Original tax forms (Steuererklärung 2022)	<input type="checkbox"/> New clients: copy of tax declaration and assessment 2021
1. Income	<input type="checkbox"/> All end of the year salary statements	<input type="checkbox"/> Alimonies (paid / received to / from ex-partner)
	<input type="checkbox"/> Pension certificates (AHV, IV, SUVA, PK)	<input type="checkbox"/> Daily allowances (unemployed, sickness, accident)
	<input type="checkbox"/> Inheritance / Donation	<input type="checkbox"/> Payout of 2 nd or 3 rd pillar lump sum (vested benefits)
2. Wealth	<input type="checkbox"/> Bank accounts (balance, interests and fees)	<input type="checkbox"/> Investments: tax certificates / depot statements
	<input type="checkbox"/> Life insurance (tax / surrender value)	<input type="checkbox"/> Lottery, Lotto- and Toto winnings
3. Debts	<input type="checkbox"/> Credit cards (balance, interests and fees)	<input type="checkbox"/> Personal loans or debt (balance, interests and fees)
4. Real Estate	<input type="checkbox"/> Tax value and imputed rental income	<input type="checkbox"/> Rental income (overview with receipts)
	<input type="checkbox"/> Mortgage (balance, interests and fees)	<input type="checkbox"/> Costs: maintenance, admin, repairs / renovations
5. Healthcare	<input type="checkbox"/> Healthcare insurance tax certificate	<input type="checkbox"/> Receipt for dental treatments or not insured costs
6. Deductions	<input type="checkbox"/> Commute (public transport, car, bike)	<input type="checkbox"/> Professional education (paid by your own)
	<input type="checkbox"/> Donations, political parties, associations	<input type="checkbox"/> Contributions to 3 rd pillar (3a), catch-up 2 nd pillar (PF)
	<input type="checkbox"/> Health insurance premiums	<input type="checkbox"/> Day care for children (daycare center, Tagesmutter, Kita)
	<input type="checkbox"/> Support to parents/adult children (in need)	<input type="checkbox"/> Other: <input type="text"/>
7. Self-employment	<input type="checkbox"/> Balance Sheet, Profit & Loss Statement	<input type="checkbox"/> Inventory and other relevant accounting documents
8. Other Informations	<input type="checkbox"/> Change of marital status, birth, move, etc.:	<input type="text"/>
9. Other comments	<input type="checkbox"/>	<input type="text"/>

We kindly ask you to return your documents, **WITHOUT paper clips or staples and in A4 sheet format**, with the enclosed envelope and this checklist filled out, to our address (**see below**) by postal mail or by dropping it into our mailbox.

Fiscal Representation

- Yes, I would like that TAXConsulting **takes on**, apart the filling out of the tax forms, also over my fiscal representation.
(Additional cost per year CHF 240 excl. VAT.)

Insurance and pension Check

- Yes, I would like to get in touch with a **specialist** to check and optimize my existing products and solutions.

myTAXCloud® Service

- Yes, I would like to have **access** to a private and secure folder on myTAXCloud.ch for document sharing.
(There are no additional cost for this service)

Real Estate and Mortgage Check

- Yes, I would like to get in touch with a **specialist** to check if the purchase of a property is possible for me or to reduce the current costs of my actual mortgage.