

<input type="checkbox"/> Ms Person1 <input type="checkbox"/> Mr	<input type="checkbox"/> Ms Person2 <input type="checkbox"/> Mr
Surname & Firstname: <input style="width: 95%;" type="text"/>	Surname & Firstname: <input style="width: 95%;" type="text"/>
Street, No.: <input style="width: 95%;" type="text"/>	Street, No.: <input style="width: 95%;" type="text"/>
ZIP code, City: <input style="width: 95%;" type="text"/>	ZIP code, City: <input style="width: 95%;" type="text"/>
Religion: <input style="width: 95%;" type="text"/>	Religion: <input style="width: 95%;" type="text"/>
Working Place: <input style="width: 95%;" type="text"/>	Working Place: <input style="width: 95%;" type="text"/>
Workload in %: <input style="width: 95%;" type="text"/>	Workload in %: <input style="width: 95%;" type="text"/>
Marital Status: <input style="width: 95%;" type="text"/>	Marital Status: <input style="width: 95%;" type="text"/>
Phone Number: <input style="width: 95%;" type="text"/>	Phone Number: <input style="width: 95%;" type="text"/>
e-Mail: <input style="width: 95%;" type="text"/>	e-Mail: <input style="width: 95%;" type="text"/>
Name child 1 : <input style="width: 60%;" type="text"/> DOB: <input style="width: 20%;" type="text"/>	Name child 3 : <input style="width: 60%;" type="text"/> DOB: <input style="width: 20%;" type="text"/>
Name child 2 : <input style="width: 60%;" type="text"/> DOB: <input style="width: 20%;" type="text"/>	Name child 4 : <input style="width: 60%;" type="text"/> DOB: <input style="width: 20%;" type="text"/>

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

Required documents for the tax year 2023 (all as of 31.12.2023 and worldwide)

IMPORTANT	<input type="checkbox"/> Original tax forms (Steuererklärung 2023)	<input type="checkbox"/> New clients: copy of tax declaration and assessment 2022
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 insurances (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 and other 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 style="width: 100%;" 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 style="width: 100%;" type="text"/>
9. Other comments	<input type="checkbox"/>	<input style="width: 100%;" 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.

Tax Representation

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

Online Submission of Tax Declaration

Yes, I would like my 2023 tax declaration to be filed **online**. I will receive confirmation of submission and digital copy of the tax declaration.