

Checklist for tax



- General:**
 - Original tax return and securities list**
 - New customers: a copy of last year's tax return
 - Any civilian changes (e.g. marriage): _____
- Income wage card**
 - S for secondary and part-time acquisition (both spouses)
 - In addition to earnings (VR fee, government activity, fire brigade, etc.)
- Senior replacement income**
 - IV, pension certificates Pension Fund (payment documents)
 - daily allowance certification (unemployment insurance, sickness, accident insurance)
 - preserved, paid alimony, maintenance fees (payment documents)
- Other income**
 - lump-sum benefits from pension funds, insurance
Reason: (e.g. residential property) _____
 - Lottery profits
 - Other income: _____
- Deductions**
 - Membership fees and donations to political parties
 - Support the needy (payment documents)
 - Medical Expenses: according deductible health insurance bills, if higher than 5 % of net income
 - Child care costs (payment documents)
- Assets**
 - Gifts or inheritances (inventory control)
 - undistributed inheritances (billing, inventory control, insert sheet 5.6)
 - Other assets (cash, precious metals, precious stones, etc.)
 - Vehicles (car brand, acquisition year, purchase price)
- Securities directory**
 - Banking, PC-account statements at 31.12 (balanced accounts)
 - Excerpts depot at 31.12.
 - Redemption or purchase of securities documents
 - Interest and dividends (payment documents)
 - Investments in companies, associations of persons
- Real estate**
 - Tax value
 - Imputed rental value
 - Inventory of rental income
 - Maintenance, operational and administrative costs (receipts, invoices)
 - Floor owner deduction
- Debt**
 - at 31.12. (e.g. mortgages, taxes, etc.)
 - Debt interest of proof
 - Amortization documents
- Professional expenses**
 - Advanced Training costs
 - the cost of traveling to work (rail, bus, bicycle, car, etc.) when car why?
 - for weekly stays (rental costs)
- Insurance**
 - Certificates bound Self-Care (Pillar 3a)
 - Certificates of shopping services in the Pillar 2
 - Repurchase value of certificates from life and pension insurance
(Completion and expiration year, insured)

consignor:

Veriduna Treuhand AG
Stettbachstrasse 6
Postfach 177
CH-8600 Dübendorf

Date _____

Order to compile the 20__ tax return

Enclosed you find the documents, who are selected in the checklist.

Comment: _____

name: _____

signature: _____