

Checklist Swiss tax return 2015

Please send us the following documents:

General

- original forms of the tax return 2015 (or a copy of the first page of the tax return form 2015 is sufficient)
- copy of the last tax return 2014, incl. date of birth, civil status, religious denomination (for new customers only)
- phone number, e-mail and current address in case of further questions
- place of work and information how you go to work: by car or by public transportation
- name and date of birth of children living with you, expected date of graduation
- copy of apprenticeship of children, if they are of age
- year-end statements as at 31.12.2015 of all your bank accounts and securities/custody ac- counts showing interests and dividends earned
- year-end statements as at 31.12.2015 of mortgages and other debts showing interests paid
- paid or received alimony (please specify the respective persons)

Income

- salary statement(s) from your employer(s) of both spouses
- social security and insurance benefits
- annuities, pensions
- other income (lottery, etc.)

Deductions

- transportation expenses from home to place of work: car kilometers per day or ticket costs for public transport (depending on what you use)
- copy of health insurance policy (Krankenkassenpolice) 2015 healthcare costs (dentist, glasses/contact lenses, etc.)
- costs of further training and professional retraining (language courses, etc.)
- additional costs for weekly stay at place of work (location, costs, number of days, etc.)
- other occupational expenses (working clothes, membership fees to professional associations, etc.)
- statements of contributions to private restricted pension plans (pillar 3a)
- charitable donations
- child care (KITA, playgroup, nanny, etc.)
- statements of cash values of life insurance(s) 3b as at 31.12.2015

Homeowners

- house/condo: rental value (Eigenmietwert) and tax value (Steuerwert), mortgage interests, maintenance expenses (including copies of the invoices)