

Simplify Your Tax Declaration:

1. **Collect documents:** Gather the required documents as listed in our checklist.
2. **Complete missing information:** Fill in any missing details in the field on the next page.
3. **Submit your documents:** send us copies of all your documents along with this checklist either:
 - by post or
 - **digitally:** Use our secure and encrypted upload service kDrive by Infomaniak at taxum.ch/en/upload



If you have any questions, please call us at 044 244 27 15. We are happy to help!

How Can We Contact You If We Have Questions?

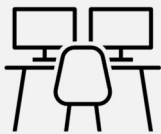
Phone number: Email address:

Please Gather Your Documents:

In the Swiss tax declaration, your income *and* assets are declared worldwide.

This means, for example, that *foreign* income, properties, bank accounts, etc., must also be included!

Income



- Tax forms
- **Copy of the previous year's tax declaration** (*for new clients only*)
- **All salary certificates for the entire year**, including remuneration for meetings, board member fees, etc., as well as appendices regarding employee share plans
- **Alimony payments from an ex-partner:** Divorce or separation agreements and bank statements documenting these payments
- **Are you self-employed?** Profit and loss statement (in tabular form), balance sheet, driver's logbook. If in doubt, please contact us at **044 244 27 15**
- **Annual statements for compensation for loss of earnings:** Daily allowances from unemployment benefits, health insurance, accident insurance, sickness daily allowance insurance, SUVA/EO
- **Pensions:** AHV/IV/pension fund certificates, and other pension income
- **Income from civil service jobs**, e.g., fire brigade, school board, etc. (please note this on the salary certificate)
- **Lotto/toto winnings.**

Children



- Name, date of birth
- **Directly paid child and family allowances**, if not included in the salary certificate
- For **unmarried parents:** How are **custody and care arrangements** defined?
- Certification of **alimony payments received or paid**, including the address of the recipient or payer
- **Does the child live in your household or with someone else?** (If with someone else, please provide the address and information regarding custody)
- For **children over 18 years** old still in their first education as of December 31: Proof of study or training, including the expected completion year. If the child is no longer in their first education as of December 31, please note this
- Statements showing **childcare costs**, if both parents are earning an income

Properties



- **Mortgages:** Refer to the section "Debts"
- **Invoices and breakdown of maintenance costs**, value-preserving renovations, and energy-saving renovations (if exceeding 20% of the imputed rental value or rental income). For renovations: include before-and-after photos
- For **Swiss properties:** Official tax certificate detailing imputed rental value and taxable value
- For **foreign properties:** Market value estimation
- **Certificates for received subsidies**, e.g., for environmental or energy-saving measures
- **Property address**
- **Purchase agreement** for newly acquired properties or **sales agreement** for sold properties
- **Type of property** (house/apartment)
- **In case of co-ownership** (e.g. community of heirs or cohabitation), provide information about your share
- **Statement of rental/lease income received** or, for usufruct/beneficial use, a notarial certificate

Wealth



- **Tax certificates/statements for bank/post accounts**, savings deposits showing the balance as of December 31 and any interest received/paid during the year
- **Closing/opening confirmations** if an account was closed or opened during the year
- **Tax certificate for securities** (stocks, ETFs, funds, company shares, employee participation plans, etc.), value as of December 31, and all interest and dividends received during the year. For Swiss accounts, you can request a "Steuerausweis" (tax statement) from the bank. For shares in unlisted companies, provide the company's annual financial statements (balance sheet and profit and loss statement)
- **List of cryptocurrency holdings** (quantity, name of currency, and exchange rate as of December 31)
- **Proof of foreign withholding taxes paid** on dividends and interest
- **Proof of asset management fees**
- **Life insurance**: Certificate of surrender value as of December 31
- **Proof of received, not yet paid or undistributed inheritances** (date, value, name, and address of the deceased or donor)
- **Proof of capital withdrawals** from the pension fund or Pillar 3a
- **Value of other significant assets** (e.g., classic cars, ships, collections, precious metals, cash, jewelry, art, etc.)
- **Car/Motorcycle**: Year of purchase and purchase price, leasing yes/no

Debts



- **Interest certificate with outstanding balance** as of December 31 (mortgages, small loans, personal loans, credit card debts)

Clients with US tax liabilities



- Asset overview as of December 31 for **IRA, Roth IRA, and 401(k)**

Various deductions



- **Work-related expenses**: Number of kilometers driven to and from work, or receipts for train, bus, or tram passes, receipts for self-financed continuing education costs, membership fees for professional associations. For exclusive home office arrangements, provide a copy of the rental agreement
- **Health insurance** tax certificate for paid premiums and self-covered medical expenses, as well as any additional receipts, e.g., dentist, glasses, or medical certificate for prescribed diets (e.g., for celiac disease)
- Receipts for **disability-related costs**
- **Retirement savings**: Official tax certificates for contributions to pillar 3a or pension fund buy-ins
- **Alimony payments to an ex-partner**: Divorce or separation agreement, along with bank receipts showing the payments
- **Donation certificates/membership fees** (to charitable organizations or political parties in Switzerland)
- **Payment receipts for support contributions** to persons in *verifiable* need (name, address, date of birth, amount). The deduction is only possible if the supported person is *unable* to meet their basic needs independently

Is there anything else we should know?

Has your personal situation changed? Have you sent us any documents with additional comments? Or are there any other important details we should be aware of? Please share them with us here.

Examples:

- Relocation (with date)
- Change in marital status
- Church membership withdrawal/entry
- Birth or adoption of children
- Purchase or sale of real estate
- Business establishment
- Receipt of a gift or inheritance
- Information on foreign bank accounts
- etc...