

# checklist for tax declaration 2015



*Your tax declaration / return can be completed competent, if you collect the documents completely according the following list:*

*Please use **NO staples**, it will make us a lot easier to work with!*

## General / Information / Formuals

- ☐ Originals of tax return (received from municipal tax office, DIN A3 folded)
- ☐ Copy of last year's tax return, if you have received it already
- ☐ Any civilian changes in comparison to year 2014 (details next page)
- ☐ Information from children, you support financial (details next page)
- ☐ Tax certificate of withdrawal from 2nd or 3rd pillar 2015  
(e.g. for buying a house, becoming self-employed, leaving Switzerland and EU, etc.)
- ☐ Information about inheritances and financial gifts received or given 2015
- ☐ Undistributed inheritances, (inventory control, account statements, etc.) / Switzerland or abroad

## Income

- ☐ Salary statement / s
- ☐ Tax certificate of received pensions from AHV or IV, Switzerland or abroad
- ☐ Tax certificate for received unemployment benefits/allowance (ALV)
- ☐ Tax certificate of further received daily benefits/allowance from accidents or disease
- ☐ Alimonies paid / received from or paid to separated / divorced spouse and children
- ☐ Further income (z.B. daily benefits, VR fee, fire brigade, private pensions, life insurance etc.)

## Deductions

- ☐ Expenses of traveling to work (train, bus, bicycle, car, etc.)
- ☐ Advanced Training / further education costs (paid in 2015)
- ☐ Tax certificate health insurance (please ask for, if not automatically received)
- ☐ Copies of invoices of self-paid health cost, such as dentist or physiotherapy, etc.
- ☐ Confirmation for the contributions of precaution 2nd/3rd pillar 2015 (life insurances)
- ☐ Donations (if overall more than CHF 300.- a year)

## Asset

- ☐ Bbank account statements at 31.12.2015 / tax certificates of interest and dividends / closing statements
- ☐ US-Accounts: 1099/K-1 statement plus year-end summary overview
- ☐ Tax reports for Switzerland of your security deposits (please ask your bank), Switzerland or abroad banks
- ☐ Lottery profits, if withholding taxes deductet (original document needed)
- ☐ Confirmation of interests of debts 2015 (mortgage, private loans, bank loans, credit cards, etc.)
- ☐ Car/s & motorbikes & ships (brand, acquisition year, purchase price), Leasing? Yes ☐ No ☐
- ☐ Repurchase value of certificates from life and pension insurance (3rd pillar b)

## child care costs

- ☐ Child care costs (ask for a tax certification or annual overview) , during the time both parents are employed

## for owner of a house / property

- ☐ Maintenance, operational and administrative costs (copies of receipts, invoices, etc.)
- ☐ Steuerbescheinigung bezahlte Hypothekarzinsen 2015 / Zins-und Saldoausweise per 31.12.2015
- ☐ Eigenmietwert oder Liegenschaftsbewertungsformular, Mietzinseinnahmen (mit Belegen, Kontoauszügen)
- ☐ Income / interests from leasehold and rentals
- ☐ Tax overview, especially for floor owner (ask your property management for it)

## additionally for self-employed

- ☐ Balance sheet & income statement 2015, if not done by us
- ☐ Documents for all further expenses (such as telephony, mobile, internet, advertising, etc.)

If you have any questions, don't hesitate to contact us:

**Furttal Treuhand AG, Vorderdorfstrasse 40, 8112 Otelfingen / [www.furtttaltreuhand.ch](http://www.furtttaltreuhand.ch) / Tel. 043 411 60 20**

# NOTES



FURTAL TREUHAND AG

## changes personal data in comparison to year 2014 (at December 31st 2015)

	Husband / Person 1	Wife / Person 2
Name / s	<hr/>	<hr/>
civil status	<hr/>	<hr/>
confession	<hr/>	<hr/>
employer	<hr/>	<hr/>
job location	<hr/>	<hr/>
job title	<hr/>	<hr/>

## further changes in comparison to year 2014

### birth of a child

Name / given Name	<hr/>	<hr/>
date of birth	<hr/>	<hr/>
address if not the same	<hr/>	

Education	Husband / Person 1	Wife / Person 2
education	<hr/>	<hr/>
start - end	<hr/>	<hr/>
	<b>Child:</b>	<b>Child:</b>
education	<hr/>	<hr/>
start - end	<hr/>	<hr/>

### civil changes

wedding date	<hr/>
divorce date	<hr/>
day of death	<hr/>

## further information, notes and questions (such as alimony, need-to-knows, etc.)

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