

# TAXALIS

## Checklist for Swiss tax declaration

**Name** \_\_\_\_\_

**Date** \_\_\_\_\_

### General

Tax forms / online filing code

Civil status: date of change

Child birth: name & birthdate

Confession: date of change

### Income

Annual salary statements (Lohnausweis)

Way of commute and workplace, if changed

Part time employees: work percentage or number of days worked, if changed

Any other income certifications (e.g. pension, social security etc.)

Lottery win certifications

### Deductions

Receipts for professional development costs

Third pillar certifications (3. Säule a)

Annual health insurance statement or total amount of premiums paid

Receipts for donations

Receipts for health costs (e.g. dentist, optician, health insurance deductible)

### Assets

Bank account certifications

Investments: evaluation as per Dec. 31st and income certification

Debt certifications (e.g. loans, credit card, mortgage)

Tax invoices paid (if you received them directly)

### Real estate

Recent evaluation from Gemeinde (Schätzung) if changed

Receipts for maintenance costs and cantonal property insurance

Annual statement for shared costs, e.g. condominium, Stockwerkeigentum