

Checklist for your 2014 tax return

	Husband / Single	Wife
Name, First Name	_____	_____
Street	_____	_____
Zip Code, City:	_____	_____
Moved of / when from where	_____	_____
Birth date	_____	_____
Confession	_____	_____
Occupation, employer	_____	_____
Civil status by the end of 2014	_____	_____
Phone	_____	_____
E-mail	_____	_____

Children

First name	Date of birth	School	Beginning / end of school
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please attach original receipts and detailed statements for 2014.

Original forms tax return 2014 (if we do not have yet a power of attorney from you)

Income	Husband / Single	wife Solitary
Wage statements Home Purchase and sideline	<input type="checkbox"/>	<input type="checkbox"/>
Pension statements AHV and pension annuities	<input type="checkbox"/>	<input type="checkbox"/>
ALV certificate and insurance daily allowances	<input type="checkbox"/>	<input type="checkbox"/>
Other revenues	<input type="checkbox"/>	<input type="checkbox"/>

Alimony	paid	got
Alimony for spouses (divorced / separated)	<input type="checkbox"/>	<input type="checkbox"/>
Alimony minor children	<input type="checkbox"/>	<input type="checkbox"/>

- Certificate Pillar 3a
- Certificate BVG (Shopping contributions to the pension fund)
- AHV bills paid contributions of inactive
- Installation for donations and / or contributions to political parties
- Surrender value as of 31.12.2014 Insurance Company of Endowment Life insurance and single premium
- Inventory of private vehicles (car, motorcycle)
 - Brand _____ Year _____ Year of Purchase _____ Purchase price _____
 - Brand _____ Year _____ Year of Purchase _____ Purchase price _____
- Are you involved in an undivided inheritance? Yes No
- inventory of undistributed inheritances CHF _____ (please attach proof)
- Yield to undistributed inheritances CHF _____ (please attach proof)
- Copy estate inventory / discount account
- Other assets (precious metals, jewelry, coin collection, etc.) • CHF _____

Securities directory

- Bank documents (capital and interest certificates by 31.12.2014)
- Statements of any resolved accounts in 2014
- Securities and investment statements by 31.12.2014
- Private Loans and interest by 31.12.2014
- Certificates lottery winnings (incl. Inserts for Lotto, Toto, etc.)

Property Directory

- Rental income per property
- Property maintenance documents, statement and supporting documents for each property
- Property valuation of each property community
- Copies of any purchase and / or sale contracts in 2014

Professional expenses

- Travel costs 2014 (public subscription. Traffic, stating kilometers per commute)
- Subscriptions _____ Kilometer per Commute _____
- Installation and evidence of continuing education (language, computer courses, etc.)

Debt directory

- Debt and mortgage interest by 31.12.2014
- Proof of other private debt (like open tax bills, loans, Credit card statements, customer cards, etc.) by 31.12.2014

Sickness and accident cost / disability costs / insurance directory

- Establish health insurance premium in 2014
- Proof of health insurance premium reduction in 2014
- Installation and receipts for medical expenses (deductibles / franchises both health insurance, nursing home bills, dental bills, opticians, etc.)
- Installation and evidence of disability costs unless they have been taken over by a third party.
- Type of disability _____
- Premium for life insurance and personal accident insurance

Additional informations for tax returns

- Certificates of capital payments from Pillar 3a, pension, accident or Liability cases
- Evidence of any capital benefits from life insurance
- Proof of inheritance divisions in 2014
- Have you received a donation / advance on inheritance? Yes No
 - received from: _____ Date: _____
- Relationship: _____
- Further information / notes _____

If you have any questions about your tax return or to our checklist? Please call us and we will advise you.