

Checklist Swiss tax return 2019

Please send us the following documents:

General

- original forms of the tax return 2019 (when submitted via e-mail/dropbox a copy of the first page of the tax return form 2019 is sufficient)
- For new clients only: copy of the last tax return 2018 (for existing clients: not necessary)
- date of birth, civil status, religious denomination, profession (incl. spouse)
- phone number, e-mail and current address in case of further questions
- work load in %, 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 (if divorced: custody)
- copy of apprenticeship / confirmation of studies of your children, if they are 18 years old or more
- year-end statements as at 31.12.2019 of all your bank accounts and securities/custody accounts showing interests and dividends earned
- year-end statements as at 31.12.2019 of mortgages and other debts showing interests paid
- received alimony (name and address of divorced spouse; if paid to children: names of them)
- paid alimony (name and address of divorced spouse; if paid to children: names of them)
- cars / motorcycles: brand and model, year of purchase, purchase price

Income

- salary statement(s) from your employer(s) of both spouses
- unemployment benefits, social security and insurance benefits (sickness, accident benefits, etc.)
- annuities, pensions (AHV, IV, Pensionskasse, etc.)
- other income: lottery winnings (if > CHF 1'000.-), etc.

Deductions

- transportation expenses from home to place of work: car kilometers per day or ticket costs for public transportation (depending on what you use)
- health insurance: tax statement or health insurance policy 2019
- healthcare costs not covered by health insurance (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, rental costs, number of days, etc.)
- other occupational expenses (working clothes, membership fees to professional associations, etc.)
- statement 2019 of the payments into pillar 3a or voluntary purchase into the pension fund
- receipts of charitable donations
- child care (KITA, playgroup, nanny, etc.)
- statements of cash values of life insurance(s) 3b as at 31.12.2019
- rental contract (only cantons of Zug, Geneva and Waadt)

Homeowners, self-employed persons

- house/condo: construction year, rental value (Eigenmietwert) and tax value (Steuerwert), mortgage interests, maintenance expenses (including copies of the invoices)
- self-employed persons: financial statements as at 31.12.2019