




Checklist tax return 2022

	husband/single person	wife
surname/ first name:	_____	_____
birthdate/religion:	_____	_____
marital status 2022:	_____	_____
address:	_____	_____
profession:	_____	_____
place of work:	_____	_____
phone  / e-mail:	_____	_____
nationality:	_____	Permit: B <input type="checkbox"/> C <input type="checkbox"/> Others _____

Enclose copy of permit

important documents

- Swiss tax forms (**original forms**)
- Copy of your last Swiss tax return and last Swiss tax assessment (**only new clients**)

children

- surname/ first name, date of birth, school / education, beginning/end of school, religion

income (husband and wife)

- salary statement (**please attach a copy**)
- income from pension fund (**please attach a copy**)
- other earnings (**please attach a copy**)

alimony (paid or received)

payments to spouse (divorced/separated) (**please attach written agreement**)

payment for children (**please attach a copy**)

remarks: _____

securities as per 31.12.2022

- bank statements (incl. accounts abroad) as per 31.12.2022 (**please attach copy of statement**)
- shares, bonds funds fixed deposits (**please attach copy of tax statements** or copy of buying- & selling statements)
- dividends / interest (please attach copies)
- loan granted to: _____ (please attach copy of agreement)

liabilities as per 31.12.2022

- balance of debts (mortgage, loan, credit etc.) and paid interest of debt (please attach copy of statement)

owner of properties (Switzerland and abroad)

- purchase date and purchase price
- estimated fair market value
- rental income if any
- maintenance / renovation cost if any

work expenses husband / single person

- place of work: _____
- costs for annual or monthly public transportation CHF _____
- if you go to work by car: distance between home and workplace (km/day) _____
- Volume of work in % _____
- self-paid costs for education/ seminar costs (please attach invoice copy of seminar/course)

work expenses wife

- place of work: _____
- costs for annual or monthly public transportation CHF _____
- if you go to work by car: distance between home and workplace (km/day) _____
- Volume of work in % _____
- self-paid costs for education/ seminar costs (please attach invoice copy of seminar/course)

other deductions (please mark where applicable)

- additional payments to 2nd or 3rd pillar (please attach certificate for tax purposes)
- health insurance premium (please attach certificate for tax purposes)
- self-paid treatment expenses, e.g. glasses, dentist etc. (please attach copies)
- child care expenses (please attach a copy)
- costs for nursing home (please attach copy paid invoices)

heritages and gifts (please attach voucher of payment/receipt)

- first name/ surname of deceased/donor and address, date of death, degree of kinship, amount, date of payment

others (please mark where applicable)

- lottery winnings (please attach statement of profit)
 - lump-sum benefit e.g. disbursement of pension fund (please attach a copy)
 - life insurance (please attach a copy)
 - donations (please attach a copy)
 - other assets e.g. gold, pictures etc. (please attach receipt)
 - vehicles, boats (type/brand, year of purchase, purchase price/value)
-

my / our application to C. Schmid Treuhand GmbH includes the following services:

- preparation of tax return
- review of tax assessment
- to file objection (if necessary)

signature husband/single person

wife

place/date: _____

In order to prepare your Swiss tax return efficiently and in due time, we kindly ask you to read our checklist carefully and to submit the respective documents completely. Thank you very much.

Treuhand Catherine Schmid GmbH

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