

CHECKLIST

for tax return employee



Schmitt Treuhand

Personnel situation

- original tax forms
- if new customer copy of last tax return
- information about any civilian changes (Copy of permission)

Income

- Certificate of salary
- Confirmation of pension fund
- Vouchers of other additional earnings

Deduction

- The cost of travelling to work (public transportation)
- Information about the place of work and volume of work
- Bills for training or formations cost
- third pile payment
- donations to non-profit organisation
- nursery costs
- yearly confirmation of health insurance
- invoices for medical costs (dentist)
- donation to political parties

Securities

- Statements as per December 31 of securities, bank accounts
- Sale and purchase vouchers of securities
- Interest and dividends vouchers (securities and accounts) whole year

Other Assets

- Life insurances
- Car

Real Estate

- Information about value of Swiss and foreign property
- Invoices for maintenance
- Information about rental income

Other Documents / Information's

- confirmation about debt with debt interest proof

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Mitglied TREUHAND | SUISSE

