

Checklist for tax return

We are happy to assist you with the preparation of your tax return. You can send us the necessary documents or bring them by in person. To arrange an appointment, please contact us by telephone or e-mail.

We require the following documents to prepare your tax return:

Please note that we need the details of your worldwide income and assets.

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| <input type="checkbox"/> Copy of last tax return | (if not prepared by bachmann treuhand) |
| <input type="checkbox"/> Tax forms | |
| <input type="checkbox"/> Change in personal data | Marital status, religion, children, job change, retirement, inheritance, etc. |
| <input type="checkbox"/> Children | Name, surname, Date of Birth, school / education expected until |
| <input type="checkbox"/> Notification of a possible interruption of employment | |
| <input type="checkbox"/> Salary certificate(s) | including additional income |
| <input type="checkbox"/> Self-employment | Annual financial statements |
| <input type="checkbox"/> «AHV/IV/pension fund»-pensions / daily benefits | Confirmations |
| <input type="checkbox"/> Maintenance contributions | Divorced/separated partners and children |
| <input type="checkbox"/> Professional expenses | Workload, km per day, train/bus, subscription cost |
| <input type="checkbox"/> Debt liabilities | Interest statements per 31.12 |
| <input type="checkbox"/> Payment into 2nd and 3rd pillar | Certificates |
| <input type="checkbox"/> Health insurances | Overview of premiums and costs |
| <input type="checkbox"/> Third-party care costs children | Invoices incl. number of lunches, expenses for camps if childcare is required (due to employment) |
| <input type="checkbox"/> Education and training costs | Invoices |
| <input type="checkbox"/> Sickness and accident costs | Invoices |

- | | |
|--|---|
| <input type="checkbox"/> Donations | Certificates |
| <input type="checkbox"/> Assets | Certificates per 31.12. |
| <input type="checkbox"/> Cash, gold and other precious metals | Amounts, quantity |
| <input type="checkbox"/> Balancing interest of final tax invoice | Interest income / debt |
| <input type="checkbox"/> Life insurance | Premium, term, amount, surrender value |
| <input type="checkbox"/> Vehicles | Type, purchase price, acquisition year, notification in the event of a change |
| <input type="checkbox"/> Real estates | Document with official value (tax value and imputed rental value) |
| <input type="checkbox"/> Rental income | Receipts/details of rental income |
| <input type="checkbox"/> Mortgages and interest on debt | Balance and interest statements per 31.12. |
| <input type="checkbox"/> Maintenance costs | invoices |
| <input type="checkbox"/> Undistributed inheritance | |
| <input type="checkbox"/> Donations / inheritances | Proof of gifts, inheritances or advance payments received or made; inventory list; date, name, amount |
| <input type="checkbox"/> Lump-sum payments from pension schemes | Certificates |

I/we hereby confirm that all the information and documents required for the preparation of the tax return have been submitted to bachmann treuhand gmbh:

Tax year: _____

 Date/Place

 Surname/name

 Signature

 Surname/name

 Signature