

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

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

This list is not intended to be exhaustive.

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