

## 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 need the following documents to prepare your tax return:

Please note that we need the income and assets worldwide.

Copy of last tax return	(if not prepared by bachmann treuhand)
Changes in personal data	Denomination, children
Salary certificate(s)	
«AHV/IV»-pensions	Confirmations
Maintenance contributions	Divorced/separated partners and children
Professional expenses	Workload, km per day, train/bus, subscription cost
Debt liabilities (worldwide)	Interest statements per 31.12
2nd and 3rd pillar	Certificates
Health insurances	Premiums
Third-party care costs children	Invoices incl. number of lunches
Education and training costs	Invoices
Sickness and accident costs	Invoices
Donations	Certificates
Assets (worldwide)	Certificates per 31.12.
Balancing interest of final tax invoice	Interest income / debt
Life insurance (worldwide)	Premium, term, amount, surrender value
Vehicles	Type, purchase price, acquisition year
Undistributed inheritances	

Real estates (worldwide)  
Mortgages  
Imputed rental value  
Maintenance costs

Interest statements per 31.12.  
Documents official value  
Invoices (if the amount of the standard  
deduction is exceeded)

Donations / inheritances