

Documents for tax returns

Please enclose us the following supporting documentation with your tax return:

Basically, you have to declare **the entire worldwide** income and assets at your main tax domicile (Switzerland). You must specify all foreign income and assets.

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| <input type="checkbox"/> Tax forms | Copy of the last tax return including tax assessment (only for new customers)
Original forms of the tax office
Fire Service (yes or no) Underage children: Name, date of birth, date of finish education, domicile, child custody |
| <input type="checkbox"/> Family changes | Marriage, divorce, children growth, change of residence |
| <input type="checkbox"/> Religious denomination | Reformed, Roman Catholic, Old Catholic, undenominational, other confessional |
| <input type="checkbox"/> Extraordinary occurrence | Retirement, unemployment, self-employment, reducing workload, work interruptions, education, longer trips around the world |
| <input type="checkbox"/> Income revenue | All wage or salaries statements for the declaration year, indicate reason for gaps |
| <input type="checkbox"/> Sideline | Receipts of entrance and expenses, fees, attendance fees.
Please attach receipts and records of income and expenses. |
| <input type="checkbox"/> Daily allowance/statement | Unemployment pay, sickness benefits, daily accident benefits, disability benefits, military service, if not declared in the salary certificate |
| <input type="checkbox"/> Pensions/Benefits (for example: AHV, IV, BVG, SUVA, ...) | Bank or post office receipts of monthly payments, certification or a copy pension card |
| <input type="checkbox"/> Professional expenses | Vehicle: Driving kilometers to work, daily trips
train, bus, tram: Subscription price of public transport

Canteen or restaurant (quantity of lunch per week)
Documents on weekdays other residence, rental agreement, ...
Documents childcare costs (Kita, Au-pair) |
| <input type="checkbox"/> Education and further education | Deduction of expenses for the declaration year, any certificates retraining of children with documents |
| <input type="checkbox"/> Vehicle | Purchase or lease? Brand, factory price, first registration year |
| <input type="checkbox"/> Community of heirs/ undistributed inheritance | Amount, testator, address, inheritance contract, other information |
| <input type="checkbox"/> Assets, securities
(also assets abroad) | portfolio extract of all banks per Dec 31, or if not available interest statement and securities proceeds of the subject year as well as the account of sold and purchased securities in the subject year, time deposits accounts, dividends coupon, documents of lottery winnings, capital investments, crypto-currencies (Bitcoins and more), equity, loan, shares, stocks, share capital, policy capital |
| <input type="checkbox"/> Alimony | Paid or received alimony in the subject year, separately for children and divorced-spouse (incl. address) |

BUCHHALTUNG

STEUERBERATUNG

UNTERNEHMENSBERATUNG

WIRTSCHAFTSPRÜFUNG

- | | |
|---|---|
| <input type="checkbox"/> Costs of sickness | Self-paid compilation or statement of medical expenses, dentist, optician (deduct the cost sharing from health insurance) |
| <input type="checkbox"/> Supported people | Bank statements, paid support contribution, name and address of the receiver, kinship degree |
| <input type="checkbox"/> Financial precautions pillar 3a | Certificate of bank or insurance company for pillar 3a, pension plan |
| <input type="checkbox"/> Insurance contributions | Copy of the policies and receipts of paid insurance premiums, health insurance, accident insurance, life insurance without pillar 3a cash-in value confirmation |
| <input type="checkbox"/> Interest on liabilities, liabilities | Interest statement and balance statements, credit and loan agreements, consumption credit |
| <input type="checkbox"/> Voluntary contributions | Vouchers and receipts of donations, contributions to political parties |
| <input type="checkbox"/> Other cash inflows | Gifts, inheritances, anticipatory succession, Expiration endowment insurance, dypsosal compensation, capital payments (pillar 2 or 3a), severance of any kind |

House owner / Real estate (incl. informations on buying or selling in the tax period, enclose purchase contract)

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|---|--|
| <input type="checkbox"/> Current market value, imputed rental | Concerning tax assessment of the property tax value and rental value / residency / usufruct |
| <input type="checkbox"/> Mortgage interest | Existing mortgages at year-end |
| <input type="checkbox"/> Mortgages | Interest receipts of paid mortgage interest in the declaration year |
| <input type="checkbox"/> Rental income | Revenue in the declaration year (rental contract) |
| <input type="checkbox"/> Maintenance costs
(incl. Costs for energy-saving measures and environmentalism) | Costs in the declaration year (including costs of environmentally compliant heating rehabilitation, renovation or conversions) all records incl. building insurance, less insurance benefits (indemnification / restitution)
Service charge settlement shared floor |
| <input type="checkbox"/> Maintenance costs
From 01.01.2020 | Construction costs for dismantling (demolition costs) and energy and environmental protection costs, which are incurred in the tax year as a profit for the extraction, can now be carried forward to the next 2 tax years (loss lecture). |

Comment and statements

Missing documents and informations will lead to additional clarification efforts by Dynamis Treuhand and therefore additional costs for you.

You ought to consider that we can declare only what you tell us to.

For special situations please make us a note.

Many thanks for your help.