

## Checklist for Tax Return Forms 2018

### Personal Data

Surname & Firstname	Surname & Firstname Spouse:	
Religion:	Religion Spouse:	
Profession	Profession Spouse:	
Working Place:	Working Place Spouse:	
Marital Status:	Phone Number	Email:
Firstname Children:	Date of Birth Children:	
Firstname Children:	Date of Birth Children:	

(For children in education, please provide us with the details of apprenticeship or study place and organization/school.)

### Requested Documents

- Original tax return forms 2018
- All end of the year salary statements for 2018 (worldwide)
- Statement Pension Fund (Pensionskasse BVG) as per 1.1.2019
- All bank and PostFinance account statements as per 31.12.2018 (worldwide)
- List of paid or received alimonies (from or to ex-partner) during the year 2018
- Child care expenses 2018 (only if both of the parents are working)
- All interests paid and loan statement for all open liabilities at 31.12. 2018
- Certificate about voluntary payments made in 2nd (Pension Fund) and 3rd pillar during 2018
- All payments made for your personal health that was not reimbursed from the Health Insurance during 2018
- Police health insurance (Krankenkasse) as per 01.01.2019
- Buyback value of life insurances plan/investments as per 31.12.2018 (worldwide)
- If you are going to work by car: Distance from living place to working place: \_\_\_\_\_Km (1 way) from \_\_\_\_\_to\_\_\_\_\_
- Expenses for further education (betterment) and/or books
- Donations made to Swiss public institutes or political parties
- Tax value of your real estate properties in Switzerland and abroad
- Expenses regarding your real estate properties (mortgage interests, payback of loans and maintenance of the house)
- Donations to physical persons and inheritances from or to you during 2018
- Self-employed: Balance sheet as well as Profit and Loss accounting statements as per 31.12.2018

**Please check the appropriate fields above and return the envelope with all the documents and checklist or contact us in order to fix an appointment for handing over the documents in our office. Thank you.**

### Fiscal Representation

- Yes**, I would like that TAXConsulting **takes**, apart the ordinary filling out of the tax forms, also over my fiscal representation. (Additional fix cost per year CHF 190.00 excl. VAT).

### MyTAXCloud Service

- Yes**, I would like to have **access** on a personal and secured folder on MyTAXCloud Server of TAXConsulting. (No additional cost for this service).

### Insurance Check-Up

- Yes**, I would like to be connected with the independent Insurance Broker **UB Partner** in order to check my existing products and save money. (No additional cost for this service).