



Documents for tax returns

Please enclose all receipts and documents for the respective tax period 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. For the first declaration by Zofingen Treuhand AG: dates of birth of all persons, incl. minor children.

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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, separation, divorce, children growth, change of residence, residence of children |
| <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 incl. Self-employment | Receipts of entrance and expenses, fees, attendance fees, Accounting, Annual Report, Board member, 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, transportation expenses
Canteen or restaurant (quantity of lunch per week), additional costs
Documents on weekdays other residence, rental agreement, ...
Documents childcare costs (Kita, Au-pair) |
| <input type="checkbox"/> Education and further education | Deduction of self-paid expenses for the declaration year, any certificates retraining of children with documents |
| <input type="checkbox"/> Vehicle, Car, boat, Motorbike | Purchase or lease? Brand, factory price, first registration year |
| <input type="checkbox"/> Community of heirs/ undistributed inheritance | Amount, testator, address, other information, Further details, such as accounting, recording, settlement, inheritance inventory, inheritance contract, |
| <input type="checkbox"/> Assets, securities
(also assets abroad)
(Bank charges, Asset fees) | 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 (maintenance) in the subject year, separately for children and divorced-spouse (incl. address) |





- Costs of sickness Self-paid compilation or statement of medical expenses, dentist, optician (deduct the cost sharing from health insurance)
- Supported people Bank statements, paid support contribution, name and address of the receiver, kinship degree
- Financial precautions pillar 3a, Pension Fund Certificate of bank or insurance company for pillar 3a, pension fund purchase, Pillar 2a, Pension fund purchasing, Purchase of contribution years
- 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
- Interest on liabilities, credits Interest statement and balance statements, credit and loan agreements, consumption credit
- Charity, Voluntary contributions Vouchers and receipts of donations to charitable organisations, contributions to political parties in Switzerland
- Other cash inflows Gifts, inheritances, anticipatory succession (Address counterparty)
Expiration endowment insurance, disposal compensation, capital payments (pillar 2 or 3a), capital payments, capital-gains or profit, severance of any kind

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

- Current market value, imputed rental Concerning tax assessment of the property tax value and rental value / residency / usufruct
- Mortgage interest Existing mortgages at year-end
- Mortgages Interest receipts of paid mortgage interest in the declaration year
- Rental income Revenue in the declaration year (rental contract)
- 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, Condominium owners, Capital statement
- 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

Our services are subject to a fee. Missing documents and informations will lead to additional clarification efforts by Zofingen 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.

