

In order to process your tax return quickly and efficiently I would like to ask you to compile the following documents for me:

General documents

- Original forms of the current tax return (including cover sheet)
- Copy of the last tax return (unless created by us)
- Definite tax assessment of last tax period (if available)
- Residence on 31.12.2016:
- Residence on 31.12.2017:
- In case of marriage in the tax year - Date:
- In case of separation in the tax year - Date:
- In case of divorce in the tax year - Date:
- In case of death in the tax year - Date:

Personal details (for spouses, please fill in per person)

- Name: First given name:
- Street and number: Postcode/Town: /
- Date of birth: AHV-Nr.:
- Marital status : Religion:
- Occupation: Employer / Location: /
- Employment level% Phone / E-Mail /

Minors or children in education ((to be completed per child))

- Name: First given name:
- Street and number: Postcode/Town: /
- Date of birth:
- School / Apprenticeship Firm / University / University: (Confirmations mandatory)
- Living in the same household? yes / no

People who you have supported financially

- Name: First given name:
- Street and number: Postcode/Town: /
- Date of birth: Living in the same household? yes / no
- Contribution in the tax year: Fr. (Confirmations mandatory)
- Resolutions of the guardianship authority
- Contributions to persons abroad (Confirmations mandatory)

Income

- Wage tax cards about income from main dependent employment
- Wage tax cards about income from side dependent employment
- If self-employment: definitive annual closing (Accounting)
- For participations in simple companies, collective or limited partnerships (please attach the annual accounts and the commercial register extract)
- Confirmation about unemployment benefits
- Pension certificates (disability insurance, retirement pension, pension fund, maternity insurance, etc.)
- Certificate of benefits from health and accident insurance
- Received alimony, or maintenance contributions from the divorced / separated spouse (separation agreement, divorce decree and account statement of the alimony received)
- Certificate of income from maintenance contributions for minor children
- Certificate of lottery company on lottery winnings
- Certificate of income from undistributed inheritances, business and other cooperation shares
- Other revenues (for example from photovoltaic systems, etc.)

Assets

- Bank and interest statements from all bank and postal accounts as per 31.12.2017
- Coupons of accounts offset in the tax year
- Information on shares, funds, bonds, time deposits, etc. (enclose a deposit or tax statement with the related income, purchase and / or sales statements)
- Insurance premium current accounts as per 31.12.2017 including interest certificates
- Life insurance tax certificates
- Interest and capital certificates for condominiums as per 31.12.2017
- Loans as per 31.12.2017 incl. Interest certificates (enclose contract)
- Listing of cash, precious metals, jewellery, stamps, race horses, antiques, etc.
- Information about vehicles (brand, type, purchase price and year / year of purchase - enclose vehicle identification card, if leasing, enclose leasing contract)
- Listing of cryptocurrencies (Bitcoin, Ethereum, Litecoin, Dash, etc.)

Inheritances and donations

- Information on donations received or inherited premiums
Name/first name;/..... Address: Amount: Fr.
- Information about inheritances received
Name/first name;/..... Address: Amount: Fr.

Real estate (including properties abroad)

- Year of construction, year of purchase, purchase price, address of the property
- For self-inhabited property: land valuation of the cantonal tax administration
- For lent properties: statement of rental income (enclose contracts)
- Invoices and evidence of actual maintenance, repair and administrative costs
- Information about the right to reside (enclose certificate)
- Information about usufruct (enclose certificate)

Professional expenses

- Address Workplace:
- Private vehicle: kilometres (one way) to the place of work (number of days): km / days
- public transport costs (enclose receipts)
- Bicycle
- Company car: yes / no
- Lunch (number of days):
- Canteen meals or lunch checks: yes / no
- Shift work (number of days):
- Self-paid training, further education and retraining costs (enclose invoice copies)
- Additional costs for weekly stays (copy of rental agreement, subscription costs / travel costs of weekly homecoming)
- Other costs necessary for the execution of the profession - Preparation and documentation of the actual costs and justification of their necessity (e.g.: self-paid work clothes upon request of the employer)
- Membership fees for professional associations

Debts

- Interest and capital certificates for mortgages, loans and loans as per 31.12.2017
- Credit cards, small loans, consumer credits (no leasing contracts), taxes owed as well as compensatory interest to the tax office, etc.

Pension Fund (Pillar 2) and Pillar 3a

- Purchase confirmation from the Pension Fund
- Bank and / or insurance confirmations of the deposit in pillar 3a

Insurance premiums

- Health insurance premiums (enclose current policy)
- Details of premium subsidies
- Private accident insurance
- Life and pension insurance as well as their surrender value (tax value according to certificate of insurance company as of 31.12.2017)

Medical expenses

- Certificate from the health insurance company about cost sharing (KVG and VVG)
- Self-paid costs (glasses, contact lenses, hearing aids, dentist's costs, hospital, home stay, disability aids, etc. - minus reimbursement from health insurance company)

Further deductions

- self-paid contributions to the AHV and accident insurance (if not included in salary statement)
- Donations to recognized institutions (enclose receipts)
- Contributions to political parties (enclose receipts)
- Childcare costs (enclose receipts)
- Rent if living in Canton Zug (enclose copy)

Special - Deductions for expatriates

- Apartment / house abroad (housing costs for own use)
- Relocation costs (enclose receipts)
- Private school tuition costs for underage, foreign-language children at a foreign-language private school (enclose receipts)

Representation in front of the tax office

Do you wish that Köppel-Legal AG receives the power of attorney towards the tax office and that all correspondence will come directly to Köppel-Legal AG in the future? Thus, we have all deadlines for you under control and check orders and invoices for you in advance. This service will cost you more.

yes / no

Even with this list it may be that it is not clear what is needed. If it is too time-consuming for you, or if you have questions when compiling the required documents, please contact us, we are happy to help.

The checklist is also available online → www.koeppel-legal.ch



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Price List (Prices incl. VAT)

Tax return S (small) (30 minutes / up to 5 enclosures)	CHF 60.-
Tax return M (medium) (1 hour / up to 10 enclosures)	CHF 120.-
Tax return L (large) (1 hour 30 minutes / up to 15 enclosures)	CHF 180.-
Tax return XL (extra-large) (at cost)	CHF 120.- per h.
Postal delivery	CHF 5.-
Travel compensation for home visits	CHF 60.- per h.
Surcharge for representation in front of the tax office	CHF 200.-

Payment options: cash, bank, mail or credit card. Postal fees are to be paid by the customer.