



Checklist of Taxes

Personal particulars/Children

- name(n), address
- date of birth
- denomination
- marital status
- children: name, date of birth, school/education (until when?)
- alimony

Income

- pay slip (main and side job)
- reporting of pension, daily allowance, unemployment compensation and other incomes



Properties

- imputed rental income and property tax value
- received rental tariff
- receipts of maintenance costs of the property

Professional expenses

- subscription costs train/bus/tramway
- work route for motorists (notice limitations)
- receipts of expenses for further training

Depts

- bank receipts (interest and dept balance)
- Confirmation of paid loan interests and balance

Insurance/Provisions

- Confirmation of payments in the 2. and 3. pillar

Various Deductions

- costs of the asset management
- dues for political parties
- arrangement of charitable contribution
- receipts of self-paid costs of illness and accident

Assets

- redemption price of life insurances
- Car(s), brand, year of purchase, purchase price
- shares of undistributed inheritances

Securities

- statement of balance and interest of your accounts
- tax statement of your securities-depot or
- calculations of purchase, disposal and earnings of securities

Not to forget

- your tax form
- data of inheritances and donations
- data of payments of preventive services
- tax forms of the previous year (for new customers)