

Please send us the following documents:

All documents and information are required for both partners if you are in a marriage/registered partnership.

- Scan of the first page of your 2021 Swiss tax return
- Copy for previous year's tax return (in case I prepare your tax return for the first time)

Events in 2021

- If moving within Switzerland: Moving date, new address
- If moving in from abroad: moving date, confirmation of registration in the municipality of residence
- If you move abroad: date of departure, new address, confirmation of deregistration
- Marriage: date of marriage or registered partnership
- Divorce, Separation or dissolution of registered partnership: date

General information

- indication of date of birth, civil status, denomination, profession
- Names, dates of birth and denomination of the children (if divorced: information on custody)
- Information on the education of the children

Employment income

- Salary certificate of main and secondary income (For part-time employment: % for contractual work time)
- benefits (housing etc.) not declared by the employer on the wage statement
- Certificates for additional earnings (school care allowance, work for the authorities, fire brigade, any daily and attendance fees, board of directors' fees, wages in kind)
- unpaid interruptions to employment with reason
- Self-employed persons: Annual financial statements as of 31.12.2021

Business deductions

- Place of work and details of travel to work: by public transport or car
- Travel costs to the workplace (train, bus, bicycle, car)
- List of and evidence of further education (computers, language courses, etc.)
- Information on weekly stays abroad (location, rental costs, number of days, etc.)
- details of other professional expenses (professional clothing, study, membership fees to professional associations, etc.)

Replacement income

- Certificate of AHV and pension benefits
- Certificate EO, maternity and unemployment daily allowances as well as pensions, daily sickness allowances, daily accident allowances, etc.
- Confirmation received alimony and maintenance payments divided into child and spouse payments

Other income

- Lump-sum settlements (pension fund, insurance): payment receipt, information on the reason for payment (home ownership, severance payment, for permanent disadvantages)
- Participation in partnerships and simple partnerships
- Inheritance, gift, advance withdrawal, undistributed inheritance (date, amount, name / address / date of birth of the testator / donor, date of death)
- Lottery Winnings
- Further income

Deductions

- Copy of health insurance statement 2021 (tax statement health insurance)
- Self-paying medical costs 2021 (tax statement health insurance and additional costs)
- Did you receive premium reductions last year? If yes, please enclose receipt
- Alimony paid / maintenance (to divorced person: name, address; to children: names)
- Contributions to 3rd pillar and / or voluntary purchase into the pension fund
- donation receipts
- Childcare (KITA, nanny etc.)
- receipts for paid membership fees and contributions to political parties
- supporting documents for payments to persons in need of financial support

List of securities

- Interest and capital certificates as of 31.12.2021: Bank accounts, securities deposit
- Interest statements from accounts that have been closed in the meantime
- Information regarding employee options and employee shares (if not shown on salary statement)
- Reporting of private loans with interest income
- Certificate as of 31.12.2021 for life insurance 3b
- Cryptocurrencies
- Further assets

Real estate

- House or Apartment in Switzerland: Official value and imputed rental value
- invoices/receipts for paid maintenance, operating and administrative costs
- Statement of rental income (rent schedule)
- Floor owner accounts
- Administrative settlements for MFH
- Real estate abroad:
 - Address
 - Year of construction
 - Estimated market value as of 31 December 2021
 - invoices/receipts for paid maintenance, operating and administrative costs
 - Statement of rental income (rent schedule)

Remaining assets

- Cash, Jewelry, art, boats
- Car / motorcycles: make and model, year of purchase, purchase price
- Undistributed inheritances (settlements, tax inventory)
- Other assets

Debts

- Interest and capital certificates as of 31.12.2021: Mortgages and other debts
- Reporting of private loans with interest charges
- Proof of debts as at 31.12. and debt interest vouchers for the past year (credits, loans, credit cards, small loans, taxes owed, etc.)
- Amortization documents

Further details

- Information on gifts received / made and inheritances received (name, address, degree of relationship, amount, date)
- Rental contract (canton Zug only)