

## Check list for tax return 2017

- salary statement of 2017 (incl. additional occupation and spouses)
- pension approval certification of 2017 (OASI, retirement income insurance)
- unemployment confirmation
- daily allowance statement for accident, disability and health insurance
- child benefit confirmation of 2017
- interest and capital statements of all banks and Postfinance accounts per Dec 31, 2017 (worldwide)
- portfolio extract of all banks per Dec 31, 2017 or if not available interest statement and securities proceeds of 2017 as well as the records of sold and purchased securities in 2017
- interest statements of share certificates of 2017 (disbursal in 2017)
- statement for 'Säule 3a' banks and insurances in 2017
- cash-in value confirmation of life insurance in 2017
- invoices for costs of sickness in 2017 (retention, health insurance, dentist, glasses/contacts)
- health insurance premiums in 2017 incl. premium reduction (for the entire family)
- vehicle (brand / year of purchase / purchasing price), if available purchasing contract
- information about distance to work and home (train tickets, kilometer)
- confirmation for child support payment
- For house owners (worldwide):
  - mortgage debt and confirmation of mortgage interest in 2017
  - documents for maintenance of real estate in 2017
  - new property evaluation in 2017
  - summary of house rent proceeds in 2017
- information to heritages and endowment in 2017
- for expatriates (if not covered already by the employer):
  - confirmation of costs for children visiting the international school
  - confirmation for monthly rent paid
  - invoices/confirmation of costs regarding relocation
- for new clients a copy of the last tax return and tax assessment