

Checklist tax return 2018

In order to file your financial statement we need your help.

Please provide documentation/bills/receipts

Please answer questions

→ Couples need to fill out one form per person

Personal information (as of 2018, Dec. 31)

Name _____ Surname _____

Birthdate _____ female male

Address _____

_____ Canton _____

Did you move in 2018? When? What was your previous address? _____

Email for questions _____

Marital status _____ Denomination _____

Occupation _____ Location of work _____

Living single? No
 Yes with own children
 with dependent persons

Children

Name/Surname	Birthdate	School / Education	Estimated date

Name/Surname	Birthdate	School / Education	Estimated date

Name/Surname	Birthdate	School / Education	Estimated date

Costs for external childcare

Alimony paid

Alimony received

General documents

Tax Forms 2018

Copy of your tax return 2017 (for new customers only)

Income

- Salary statement
- Self-employed: Balance sheet and income statement
- Holdings (incorporated or private companies, building company, community of heirs ...)
- Documentation of alternative income (AHV, IV, ALV, any benefits ...)
- Capital payments (i. e. right to a pension, life insurance)
- Inheritance, donations
- Premium reduction
- Other income (lotteries, secondary income etc.)

Securities

- Any documentation on equity stakes and interest as of Dec. 31, 2018 (bank and savings accounts, bonds, stocks, broker and/or bank statements, account openings and/or closures)
- Documentation on private financings

Properties

- Legal value as of Dec. 31, 2018 _____
- Rent value, if self-occupied _____
- Year built _____
- Documentation on rental income (w/o utilities)
- Bills for renovation and utilities expenses paid
- Bills for other costs (i. e. insurance, caretaker ...)
- Strata account statements

Other assets

- Vehicle

Make, mode / year / year of purchase / purchase price / leasing yes – no?

Make, mode / year / year of purchase / purchase price / leasing yes – no?

- Information on other assets (jewellery, art, horses ...)
- Private pension schemes, taxable value as of Dec. 31, 2018

Liabilities

- Private financings as of Dec. 31, 2018 incl. interest and amortisation (bank, overdrafts, ...)
- Mortgages as of Dec. 31, 2018 incl. interest
- Other debts (taxes, insurances, medical payments, ...)

Professional expenses

- Employment factor _____ % if partial, which days? _____
- Information on travelling expenses (Number of days, locations, expenses, ...)
- Subsistence*
 - at home restaurant canteine
- Costs of transportation*
 - Public transportation: expenses in 2018 CHF _____
 - Bike/Moped: expenses in 2018 CHF _____
 - Motorbike: km per ride _____
 - Car: Reason for using car instead of publ. transp.: _____
km per ride _____
- List of costs personal education
- Information on other occupational expenses (work clothes, home office, premiums and contributions to unions or trade organizations, ...)

General deductions

- AHV/IV/EO-premiums as non-employed person
- Premiums paid into pension scheme 3a or into pension pool (retirement fund)
- Member premiums for political parties
- Support for dependants
- Donations to charitable or other non-profit organizations
- List or invoices on health care costs paid by yourself
(Dental care, glasses/lenses, insurance premiums, deduction, ...)
- Health care premiums paid in 2018 _____

Comments

Submit complete application (incl. checklist) to:

Simpline GmbH
Bernstrasse 31
3308 Grafenried
or by email: steuern@simpline.ch

Confirmation

I herewith mandate Simpline GmbH to fill out my tax return:

Place and date _____ Signature _____