

Check list for tax return 2016



- salary statement of 2016 (incl. additional occupation and spouses)
- pension approval certification of 2016 (OASI, retirement income insurance)
- unemployment confirmation
- daily allowance statement for accident, disability and health insurance
- child benefit confirmation of 2016
- interest and capital statements of all banks and Postfinance accounts per Dec 31, 2016 (worldwide)
- portfolio extract of all banks per Dec 31, 2016 or if not available interest statement and securities proceeds of 2015 as well as the records of sold and purchased securities in 2016
- interest statements of share certificates of 2016 (disbursal in 2016)
- statement for Säule 3a banks and insurances in 2016
- cash-in value confirmation of life insurance in 2016
- invoices for costs of sickness in 2016 (retention, health insurance, dentist, glasses / contacts)
- health insurance premiums in 2016 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
- information to heritages and endowment in 2016
- For house owners (worldwide)
 - mortgage debt and confirmation of mortgage interest in 2016
 - documents for maintenance of real estate in 2016
 - new property evaluation in 2016
 - summary of house rent proceeds in 2016
- 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