

Dear client

To be able to complete your tax return 2022, we need the original tax forms and the following documents/information:

Personal datas

First name, last name (Partner 1): _____

First name, last name (Partner 2): _____

Address: _____ Postcode / town: _____

Religious denomination (Partner1): _____ Religious denomination (Partner 2): _____

Civil status: _____ Hometown : _____

Underage children (2004 – 2022) and children of legal age who are not gainfully employed as per 31.12.2022 due to vocational training / studies:

- First and last name / religious denomination / birthdate / alimony, if any / type and end of studies
- Entertainment costs for children (add vouchers)

Private persons financially supported by you (add vouchers)

- First and last name / birthdate / address / degree of relationship / amount

Income 2022

- Any income statement (Lohnausweis) 2022 (Main- and extra income)

Pensum: _____ full working days Mon Tue Wed Thu Fri Sat Sun

part time days Mon Tue Wed Thu Fri Sat Sun

- Any statements for additional income as unemployment benefit, children allowance, pensions

Wealth as per 31.12.2022 (including wealth for underage children)

- Bank statements showing balance and interest for all bank accounts, worldwide
- Statements for portfolio management and other capital investments, income 2022 thereof
- Any bank statements for accounts opened in 2022
- Loans granted to private persons: first and last name, address, balance of the loan including interests

Professional expenses

- No changes compared to previous year
- Transportation expenses between home- and working place (used vehicle / ticket price / number of km/day)
- Costs for continuing education (add detailed vouchers)
- Other expenses (Computer, books, etc.)

Precaution

- Payment confirmation for personal pension provision for the third pillar (Säule 3a) in 2022
- Payment confirmation for pension fund second pillar (Säule 2) in 2022



Liabilities as per 31.12.2022 including interests thereof

- Mortgage as per 31.12.2022 including interests 2022
- Loans received from bank / private person with address
- Current account liabilities

Costs 2022

- Confirmation for paid premium for illness insurance (Krankenkasse), life insurance, accident insurance)
- Self paid illness costs (not covered by illness insurance)
- Paid rental costs for house / apartment (gross or net?)
- Personal contributions to social securities (AHV/IV/EO)
- Donations

Properties

- No changes compared to previous year
- Acquisition of property in 2022 (year of construction / purchase date / amount / investment / maintenance costs; add vouchers / insurance value according building insurance / GBP Nr / size of the property in m2 / rental income, if any, etc.)
- Sales of property in 2022 (date, selling price)

Gifts / Inheritance

- Received / given gifts (from / to whom, name, address, degree of relationship, date, amount of the gift)
- Received inheritance (testator, name, last address, degree of relationship, day of death, amount)
- Income / wealth out of undistributed inheritance)

Other income as:

- Received alimony
- Lotto earnings (add winning statement)
- Board fees

Other costs as:

- Paid alimony
- Costs for portfolio management

Other assets as:

Car / motor bike / boat / (if you are taxed in canton Schwyz including license number SZ.....):

Type: _____ year of acquisition _____ Price: _____ Leasing

Type: _____ year of acquisition _____ Price: _____ Leasing

Other wealth (collections, objects of art, horses etc.)

Description / value: _____

Copy of tax return and tax assessment last period

Please return this check list together with the tax forms and vouchers.

For new clients, please send also:

- Copy of the last Swiss tax return
- Copy of the last final assessment