

## CHECKLIST OF INFORMATION REQUIRED TO COMPLETE YOUR 2009 SWISS TAX RETURN

### 1. PERSONAL DATA:

#### Head of Household

Last name / first name \_\_\_\_\_  
 Date of birth \_\_\_\_\_  
 Address \_\_\_\_\_  
 ZIP / City \_\_\_\_\_  
 Tel. at work / home \_\_\_\_\_  
 Email \_\_\_\_\_  
 Denomination (church membership) \_\_\_\_\_  
 Marital status \_\_\_\_\_

#### Spouse

Last name / first name \_\_\_\_\_  
 Date of birth \_\_\_\_\_  
 Denomination \_\_\_\_\_

### 2. SUPPORTING DOCUMENTS/INFORMATION

#### General information (if available)

- Original tax forms 2009
- Copy of completed 2008 Swiss tax return
- Copy of final or provisional Swiss tax assessments of the past 2 tax years

#### Children (if applicable)

- Children in your household or who you fully support (first name, date of birth, name of school/university/education program)
- Expenses for child care (for children under 15)
- Children's income (if any) such as employment income, pensions, scholarships/grants, etc.

#### Employment income

- Salary certificates, P60, W-2, etc. and monthly payslips if not a full-year resident
- Financial statements if self-employed
- Benefits in kind if not included in salary certificate
- Income from other activities (board of director's fees, etc.) if applicable

#### Pension income (if applicable)

- Social security pensions
- Accident and disability pensions
- Private pensions / annuities
- Unemployment insurance payments

**Other income (if applicable)**

- Other income even if not sure whether taxable
- Alimony or child support received
  - Personal details of paying party
  - Supporting documents (divorce papers, court orders, contracts, etc.)

**Investments and income thereof**

- Bank, postal, portfolio, etc. statements showing balance at 31 December 2009 and interest/dividend income received during 2009
- Details of accounts closed during 2009
- Lottery prizes

**Other wealth (if applicable)**

- Details on cars, boats, etc.
- Valuable items (expensive jewellery, paintings, collections, etc.)

**Insurances (if applicable)**

- Statement showing extra contributions to private and/or company pensions
- Details on life insurances such as year of insurance taken, contract duration, insured amount, redemption value on 31 December 2009, etc. (pure risk insurances i.e. without redemption values are not tax relevant)

**Debts and interest paid (if applicable)**

- Amount owed on 31 December 2009 and interest paid during 2009 (mortgages, bank accounts, loans, unpaid bills at year-end)

**Other deductions (if applicable)**

- Alimony and child support paid
  - Personal data of recipient of payments
  - Supporting documents (divorce papers, court orders, contracts, etc.)
- Support to relatives or other persons (personal data, amounts, reason of support)
- Details on charitable donations
- Details on medical expenses not covered by insurance (please note that most cantonal tax authorities only allow deductions for total cost exceeding 5% of your net income)
- Other expenses that might be tax deductible

**Business expenses**

- Cost of commuting between home and place of work (public transportation)
  - If commuting by car or motorcycle: no. of kilometers driven per day
- If you are a „weekly commuter“: details on cost of housing during the week, travel cost between home and place of housing during the week
- Cost of courses, training, seminars etc. associated with your occupation (only if cost was not borne or reimbursed by employer)
- Other business expenses (home office, business literature, computer, tools, etc. if exceeding CHF 3,800 p.a.)

