

## How it works:

Please collect all required documents according to our checklist, add important information in the box below and choose a service package.

Send copies of all documents by regular mail or upload your documents to our secured and encrypted data upload service.



[www.deloris.ch/upload](http://www.deloris.ch/upload)

Did your situation change? Or are you sending documents that require further explanation? Is there anything else we should be aware of? Please let us know (i.e. change of address, new marital status, religion, children, purchase/sale of properties, foundation of a company, receiving a gift or inheritance, information about foreign bank documentation, etc.):

### To make sure we can contact you for any enquiries, please provide your details:

Phone number:

.....

E-mail address:

.....

If you have any further questions, please call us at **044 523 66 77**.

## Please choose a service package:

	<b>Basic</b>	<b>Comfort</b>	<b>Top</b>	<b>VIP Package</b>
Tax filing including provisional tax calculation	✓	✓	✓	✓
Deadline extension	✓	✓	✓	✓
Simple tax representation (incl. review of tax assessments)		✓	✓	✓
Full tax representation (incl. handling and review of the entire correspondence from the tax office)			✓	✓
Request of additional documents through tax office	hourly fee	hourly fee	✓	✓
Tax objection	hourly fee	hourly fee	✓	✓
Various communication related to missing information for the completion of your tax return	hourly fee	✓	✓	✓
Personal discussion of tax declaration	hourly fee	✓	✓	✓
Processing within 5 business days				✓
Personal tax advisor				✓
Additional costs for declaration of assets, debt positions, properties, tax allocations, mid-year declarations etc.	As per price list	As per price list	As per price list	✓ all-inclusive

Please mark desired package with a cross:

   

Costs for the declaration of assets, debt positions, properties, tax allocations, mid-year declarations, etc., are charged additionally. You will find a detailed list of all prices on our website at <https://www.deloris.ch/pricing>.

We are happy to give you a quote, please give us a call.

## Checklist

(please note that the worldwide income and assets must be declared in the Swiss tax return):

- New tax forms**
- Copy of previous year's tax declaration and tax assessment** (only new clients)
- Income (worldwide)**
  - Salary certificate** incl. appendix regarding employee share plans of main and side job, board of directors' compensation, attendance fees etc.
  - Are you self-employed?** Profit + loss statement (in Excel file), balance sheet, driver's logbook. If in doubt, please call us.
  - Annual statement of unemployment benefits, daily sickness benefits, benefits from health insurances, accident insurances, SUVA and EO
  - Pensioners:** AHV-/IV-/pension fund statements or orders, other pensions/benefits
  - Income from civil service jobs** e.g. fire brigade, schools etc.
  - Statements on **lotto/toto winnings**
  - Alimony payments received** from ex-partner incl. address of ex-partner
- Children**
  - Name, date of birth**
  - For unmarried parents: who has **custody** and **where does the child live** (child's address)
  - Statements documenting **childcare costs** if both parents are earning an income
  - Directly paid-out **children's and family allowances** (if not included in the salary certificate)
  - Bank statements outlining **paid or received alimony** or alimony advances (incl. address of recipient or payer)
  - For children over 18:** if the child was still in 1<sup>st</sup> education (school, university, apprenticeship etc.) on 31.12. please provide certificate and provisional end

- (year).** If the child was no longer in its 1<sup>st</sup> education, please let us know.
- Wealth (worldwide)**
  - Tax statements/account statements for **worldwide bank, postal and premium accounts** showing the value on 31.12. and the interest earned/paid during the year
  - Closing/opening statements** if an account has been closed/opened during the tax year
  - Tax statements on **assets** (shares, funds, private equity, employee shares etc.), including value on 31.12. and interest/dividends earned during the year. We **highly recommend** getting a "**tax statement**" (**Steuerausweis**) from your bank if the portfolio is with a Swiss bank. In case you have shares in a non-listed company, annual financial statements of the company from the tax year and prior year.
  - List of holdings in **cryptocurrencies** as of 31.12. (number and name of currency, price on 31.12.) and income received from staking and/or mining during the tax year.
  - Statements on **foreign withholding taxes paid** on dividends and interest
  - Statements documenting **asset management fees**
  - Life insurances:** statement documenting the cash surrender value on 31.12.
  - Statements on any **inheritance** or **donations** you received, including an inheritance that hasn't been paid out or that is still being in the process of splitting (date, value, name and address of deceased or donor)
  - Statements on **capital payments or withdrawals** from the pension fund or pillar 3a
  - Value of **other assets** of considerable value (e.g. old-timers, boats, collections, noble metals, cash, jewellery, art etc.)
  - Car/motorbike:** year of purchase, purchase price, leasing yes/no

- Debt (worldwide)** statement of interest you paid as well as value/balance of the debt as per 31.12. (mortgages, personal loans, credit card debt).
- Properties (worldwide)**
  - Mortgage statements** see above "debt"
  - For Swiss properties: statement documenting **imputed rental value** and **tax value**
  - For foreign properties: **estimate of fair market value**
  - Address** of the property
  - Type of property** (flat or house)
  - Gross rental income** received during tax year (if applicable) or in case of **beneficial use/usufruct notarized certificate**
  - Invoices and tabular Excel summary documenting **maintenance and renovation costs for preserving the value of the property and energy-saving renovations** (if costs exceed 20% of imputed rental value or rental income). In case of renovation also pictures pre + after.
  - Statement documenting **subsidies** you received for ecological or energy-saving renovations
  - Purchase contract** (only for newly acquired properties) or **sales contract** (for sold properties in the current year)
  - If property ownership is shared (e.g. community of heirs) – please provide information detailing your share
- Various deductions**
  - Work-related expenses:** number of kilometres driven to/from work, train invoices/abos, bus or tram tickets/abos, statements documenting self-financed courses/trainings, membership contributions to professional associations, **in case of working from home copy of rental contract**
  - Tax statement from your **health insurance** showing the **premiums** paid and the **unreimbursed (out of pocket) health care costs**, other health care costs (if applicable), e.g. dentist bills, doctor's certificate on necessary diets, etc.
- Statements for disability-related costs**
- Pension: official tax statement** outlining **pillar 3a contributions** and **voluntary buy-in to the pension fund**
- Bank statements showing **payment of alimony** to ex-partner (incl. divorce decree or separation agreement)
- Donation receipts/ membership fees** (to Swiss charities or political parties)
- Payment documents showing **financial support** for persons in *verifiable* financial need (name, address, date of birth, amount paid) – deduction is only possible if the supported person is not able to account for their basic needs
- Various information**
  - If you **moved** from another canton or from abroad, please provide moving date, your previous residency and copy of your registration forms
  - Please confirm your personal details** – if they are incorrect on the tax forms (e.g. profession, religion)
- For clients with US tax liabilities**
  - IRA, Roth IRA and 401K balance statements as per 31.12.
  - K-1 form for American investments
  - statements for HSA and 529 accounts
- For people on assignment in CH**
  - Assignment letter (from foreign entity)
  - Rental contract
  - International school fees for your kids
  - Travel expenses from/to Switzerland
  - Relocation fees

**Please remember we can only declare values you report to us.**