

personal details

Name _____ Date of birth: _____
 Tel. No. _____ Religion: _____
 E-mail _____ Marital status: _____

New customer: Yes No
 If yes, copy of last tax return

Access code available? Yes No

Children (minors or in initial vocational training): _____

(First and last name, date of birth, school/training company, until (year), maintenance payments received/paid and/or external care costs)

_____ If yes, please send with the documents.
 If not, please tell us.

income (Switzerland and abroad)

- wage statements for main and secondary income
- unemployment benefit (if not employed)
- AHV/pension certificate
- sickness/accident daily allowance certificate

- EO/maternity allowance
- List of alimony received
- lottery winnings

deductions

professional expenses

- workload, place of work
- Commuting by vehicle / receipt of subscription (public transport)

insurance companies

- health insurance cost summary
- Self-paid medical expenses (dentist, Optician, etc.)

Other professional expenses

- Receipts for further training (school fees incl. materials)
- Receipts for the purchase of various aids (laptop, additional costs)
- Self-paid work clothes
- membership fees to professional associations

Further deductions

- Pillar 3a certificate
- Certificate of Purchase Pension Fund
- Contributions to AHV / IV in the case of non-employment
- Donation receipts / donations to political parties
- List of paid maintenance payments

assets (Switzerland & abroad)

securities list

- Certificates / tax statements as of December 31st / as of the balancing date
- Asset overview of cryptocurrencies, stocks as of December 31st
- Certificate from the tenant deposit savings account as of December 31st
- List of employee shares/participations received as of December 31st
- For loans granted: loan agreement including notification of outstanding payment as of December 31st.
- Investments in companies including current accounts as of December 31st

Inheritances distributed & undistributed incl. advance inheritance

- Payment date incl. amount / participation rate
- Name, address, date of birth, degree of relationship, date of death of the testator

Additional assets

- Notification of cash, precious metals, etc. as of December 31st
- Vehicles as of December 31st:
 Brand, model, year of purchase, purchase price
 (LEASING IS NOT TAKEN INTO ACCOUNT)
- Surrender certificate for life and pension insurance as of December 31st

Debts

- Certification as of December 31st of all credit cards, loans
- Balance statement as of December 31 of loans received

Donations received & granted

- payment date including amount
- Name, address, date of birth, degree of relationship from the donor / recipient

Real Estate (Switzerland & Abroad)

- Purchase contract / sale contract of the property in possession
- revaluation / assessment of market value
- Certificate as of 31.12. - Mortgages
- statement of rental income received
- list of maintenance costs

Property STEG / MEG

- Administrative cost statement as of December 31st
- Interest and capital certificate as of December 31 of the joint account / renewal fund