

## Required Documentation for the Processing and Handling of Tax Returns

The following documents are required for processing and handling of the tax declaration:

- Original Tax Forms
- A copy of the last Tax Form (if available)
- Name and Addresses
- Date of Birth
- Marital Status
- Religious Denomination
- Profession
- Employer and Place of Work
- Paid Employment or Self-Employed Activity?
- Children? If yes: Number of, Names, Age, Level of Educational
- Employer Statement of Wages
- Supporting Documents of any other sideline businesses or subsidiary occupation (ex. Management Fees)
- Compilation of Rental Income
- Prior years' or any possible reappraisals of real estate properties, (Multi-story buildings)
- Retirement and Disability Income and possible Supplementary Benefits
- Statement of Income Receipts (Pension, Disability, Military Insurance)
- Receipts for Substitute Sources of Income, Daily Allowances from Unemployment Insurance
- Bank Account Statements with credited interest
- Tax Statement(s) from the Bank(s), (Securities Inventory of the Custodian Bank) ATTN: worldwide assets are to be declared
- Loan Agreements
- Lottery, Lotto and Toto Winnings Receipts
- Real Estate expenditures Receipts (Maintenance Costs, Environmental Protection and Energy-Saving Measures)
- Receipts for Interest on Debts (Mortgage Interest, Credit, Loans)
- Receipts for paid or received Alimony
- Written Confirmation of Contributions to Tied Private Pension Plans/Bound Voluntary Insurance (Pillar 3a)
- Statement on Insurance Premiums (Health Insurance, Accident, Life and Pension Insurance)
- Bank Confirmation of Home Savings and Loan Reserves
- Confirmation of Paid Contributions to AHV (Social Security for non active or unemployed persons)

- Receipts for Sickness, Accident and Disability Costs beared at own costs
- Written Confirmation of Voluntary Contributions, Charitable contributions, Donations to Political Parties)
- Written Confirmation of Taxable Values/Redemption values of Life Insurance
- Are Motor Vehicles to be found at the end of the year in your possession? If so: Acquisition Value? Year?

**Additionally for the Self-Employed**

- Balance Sheet and Income Statement of the Self-Employed Activity