

## How it works:

Please collect all required documents according to our checklist and add important information in the box below and choose a service package. Send copies of all documents by regular mail to our office and you'll receive your tax declaration ready for your signature.

**Deloris AG, Parkring 7, 8002 Zürich**  
**044 523 66 77**  
[www.deloris.ch](http://www.deloris.ch)

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 (e.g. change of address, new marital status, religion, children, purchase/sale of properties, foundation of a company, information regarding 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:

	Basic	Comfort	Top	VIP Package
	CHF 350.-	CHF 850.-	CHF 1'350.-	CHF 3'500.-
Tax filing including provisional tax calculation	✓	✓	✓	✓
Deadline extension	✓	✓	✓	✓
Simple tax representation		✓	✓	✓
Full tax representation			✓	✓
Request of additional documents through tax office	hourly fee	✓	✓	✓
Tax objection	hourly fee	hourly fee	✓	✓
Various communication/emails/calls related to the tax return and tax invoices	hourly fee	1h incl.	2h incl.	✓
Personal discussion of tax declaration	hourly fee	hourly fee	✓	✓
Previous year's comparison calculation		✓	✓	✓
Processing within 5 business days				✓
Personal tax advisor				✓
All-inclusive tax declaration				✓

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/tax-declaration/>

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

# Checklist

(please send *copies* of the documents by regular mail and *don't staple the pages together*):

- New tax forms**
  - Copy of previous year's tax declaration** (only new clients)
  - Income (worldwide!)**
    - Salary certificate of main and side job, attendance fees, management board fees etc.** including appendix regarding employee share plans
    - Are you **self-employed**? Accounting, balance sheet, driver's logbook. If in doubt, please call us at 044 523 66 77
    - Yearly statement of **unemployment money/daily allowances** or unemployment insurance funds, 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. (please note accordingly on salary certificate)
    - Statements on **lotto/toto winnings**
    - Alimony payments received** from ex-partner incl. address of ex-parnter
  - Children**
    - Name, date of birth**
    - For unmarried parents: who has **custody** and **where does the child live**
    - Does the child live in your **household**? Or with somebody else? (in this case also the child's address and information about custody)
    - 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)
    - Statement on 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 all **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 recommend getting a "tax statement" from your bank if the portfolio is with a Swiss bank and if your holdings changed towards the previous 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), unpaid tax bills and other invoices etc.
  - Properties (worldwide!)**
    - Mortgage statements** see above "debt"
    - For Swiss properties: statement documenting **imputed rental value** and **tax value** (fair value)
    - For foreign properties: **estimate of market value**
    - Address** of the property
    - Type of property** (flat or house)
    - Rental income** (if applicable) or in case of **beneficial use/usufruct notarized certificate**
    - Invoices and tabular summary documenting **maintenance and renovation costs for preserving the value of the property, energy-saving renovations and building insurance** (if costs exceed 20% of imputed rental value or rental income)
    - Statement documenting **subsidies** you received for ecological or energy-saving renovations
    - Purchase contract** (only for newly acquired properties) or **sales contract** (for sold properties)
    - 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 recommended by a doctor (e.g. coeliac disease). Please note: out of pocket health care costs must exceed around 3% of your net income to exceed standard health deduction
    - Statements for **disability-related costs**
  - Pension:** statements on **pillar 3a contributions** and **voluntary buy-in to the pension fund**
    - Documents showing **payment of alimony** to ex-partner (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 and your previous residency
    - 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.
  - 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!**
- If you have any further questions, please call us at **044 523 66 77**.