

## Tax return – Check list

- Last years tax return
- Current tax forms
- Personal details
- Children (D.O.B, in education?  
Type of education? Until when?)

### Income

- Annual salary statement (Lohnausweise)  
(for each employer)
- Alimony (if received): CHF
- Pension certificates (AHV, IV, SUVA,  
Pensionskasse, BVG, ALV)
- Unemployment benefits (incl. sickness  
and accident payments)

### Assets (CH & abroad)

- End of year bank certificates for ALL  
banks (per 31.12..)
- Bank statement for rental deposit per  
31.12.
- Tax surrender value of life insurance  
policies (3b)
- Car /motor vehicles: Year of purchase,  
purchase price, current value

### Real estate / property (not for new clients after 2018)

- Full address
- Purchase year and price
- Mortgage certificates: Remaining  
amount and interest paid
- List and receipts for administration,  
maintenance, renovations, repairs

### Property abroad (not for new clients after 2018)

- Full address
- Purchase year and price
- Mortgage certificates: Remaining  
amount and interest paid
- List and receipts for administration,  
maintenance, renovations, repairs

**If documents are incomplete or missing, you will be required to make another appointment to deliver the complete package. We do not hold on to incomplete tax returns for security reasons.**

# FMZ

Fachstelle Migration Zug

## Deductions

### Debts

- Credit card statements (interest paid)
- Loan statements (amount outstanding  
and interest paid)

### Healthcare costs

- Statement of health insurance costs
- Dental costs
- Health insurance policies
- Insurance subsidies  
(Prämienverbilligung) if received

### Professional expenses

- Place of work and type of travel to  
workplace (Public transport or Car- Km?  
Reason for car travel)
- Further professional education costs  
incl. Travel (receipts required)
- Donations, party contributions,  
professional associations

### Further deductions

- Childcare costs if both parents are  
employed
- Alimony payments (paid out)
- Supported people (min. 3000.-),  
relationship, place of residence, receipts  
required
- Pension 3a payments
- Purchase in 2nd pillar (e.g. FAR pension)
- Rental contract