

Checklist for 2009 tax return



Forms

- Original 2009 tax return (blank form) or information leaflet from cantonal tax administration
- Copy of 2008 tax return
- 2008 tax assessment (assessment protocol)

Personal details

- What was your marital status at 31.12.2009?
- What are the names of your children and what are their dates of birth?
- Do your children attend school or further education, or are they already in employment?
- Do you have any other dependents?
- Are you a homeowner?

The most important documents

- Have you received all salary statements (for both husband and wife)? Also for any additional part-time work?
- Do you receive any pensions ("AHV" - Federal Old Age Insurance, pension fund, accident, illness, etc.) or alimony?
- Did you receive payments from the pension fund or third pillar in 2009?
- Do you receive any rental income?
- Did you incur maintenance and repair costs on your own home?
- Did you incur maintenance and repair costs on any other properties?
(incl. chimney sweep, building insurance and energy-saving investments)
- Are you in possession of all interest and balance statements from all banks?
- How much debit interest did you pay in 2009?
- Did you pay "AHV" contributions (Federal Old Age Insurance) yourself?
- Did you purchase into the second pillar (pension fund)?
- Did you pay into the third pillar A?
- Did you pay any costs for further education yourself?
- Do you have records/invoices relating to business expenses (return journeys to work and meals away from home when on business)?
- Health insurance: deductible? costs? (a statement can be requested from the health insurance company)
- Did you pay any sickness and healthcare costs (incl. dentist) yourself?
- Do you pay or receive alimony?
- Did you make any charitable donations? Important: receipts confirming this

All about assets

- Do you have confirmation of the surrender values of your insurance policies?
- Do you have details of your securities portfolios?
- Did you receive money from the pension fund (second pillar) or the third pillar?
- Were you in receipt of any legacies or endowments?
- Do you have a stake in any simple partnerships, general partnerships or limited partnerships?
- What was your total level of debt at 31.12.2009?