

YOUR PERSONAL DATA VALID AS OF 31.12.2020

Name and surname:

AHV number (tax ID):

Date of Birth:

Swiss address:

Marital status as of 31.12.2020:

Occupation:

Residence permit:

Canton of residence:

IBAN:

Bank name and address:

Account holder name:

Have you filed a tax return in Switzerland before?

YES

NO

Have you received a tax return form for 2020 from the tax office by post?

YES

NO

Do you have a specific situation, e.g. change of cantons, immigration to CH during the year? If yes, briefly DESCRIBE:

Your Income in Switzerland

1. Do you have income from employment (as an employee)?

YES

NO

2. Do you work part-time?

YES

NO

3. Do you work for shifts, weekly shifts or night shifts?

YES

NO

4. Do you have other income in Switzerland, e.g. unemployment benefits, social benefits, sickness benefits, pension, self-employed person, lottery winnings, profits from bonds, dividends, income from Hauswartung, reduction of ZP so-called Spring association and others?
- YES NO
5. Do you own real estate or a car under your name?
- YES NO
6. SEND us bank statements from all Swiss bank accounts written in your name (bank account, savings account, passbooks, etc.) as of 31.12.2020 with the stated balance and interest.

Your Tax Deductions

7. Do you travel to work by car?
- YES NO
8. Do you travel to work by public transport?
- YES NO
9. Do you travel to work on a bicycle or small motorcycle / Kleinmotorrad up to 50 cm³ (also partly eg from the house to the train station)?
- YES NO
10. Does your employer contribute to your food?
- YES NO
11. Have you contributed to the third pension pillar (Steuerbelege 3a Säule)?
- YES NO
12. SEND us a confirmation of payments paid within the health, the so-called: Auszug für die Steuererklärung
13. Did you have the cost of health insurance that you paid yourself without contribution of your health insurance company (most often a dentist, but also a nursing center, alternative medicine, etc.)?
- YES NO
14. Do you have a medical diet prescribed by a doctor (eg celiac disease) or a disability?
- YES NO
15. Do you have life insurance or income insurance?
- YES NO

16. Do you have costs for further education? E.g. language course, forklift course, evening school, etc.

YES

NO

17. Are you a (voluntary) donor for a Swiss organization?

YES

NO

18. Do you pay alimony?

YES

NO

19. Does the expenditure on the profession exceed 10% of your income or CHF 2 400 (eg clothing, study, contributions to organizations, professional literature, etc.)?

YES

NO

20. Do you have debts, do you pay your mortgage, do you have a credit card debit, a car loan or private debts (NOT leasing)?

YES

NO

21. Do you financially support someone in need (not a wife and children), e.g. parents.

YES

NO

YOUR WORLDWIDE INCOME

Your income outside of Switzerland:

You need to declare your worldwide income in Switzerland. SEND us receipts of your income and the income of your spouse outside Switzerland, property outside Switzerland and statements from foreign bank accounts as of December 31, 2020 so that we can include them in your tax return.