

Sender:

Request for Swiss Tax Return Preparation

1st person

First Name Surname

Street + Nr. ZIP / City

Date of Birth Marital status

Nationality Religion (if registered)

Date of registration in CH Departure date (if known)

Occupation Place of work

Phone no. Email

2nd person (Spouse)

First Name Surname

Street + Nr. ZIP / City

Date of Birth

Nationality Religion (if registerd)

Occupation..... Place of work

Children in education

First name	Surname	Date of birth	School / Education	End date of school
.....
.....
.....

Please mark the following check box for a **Tax Representation**

> I assign Plancherel Legal & Tax to be added on my tax return **as my tax representative** in order to receive and handle any requests and correspondence from the tax office for an **additional fee of CHF 200 per tax year:**

Yes

TAX PREPARATION CHECKLIST

- All **tax forms** obtained from the tax office or **online access code**; If you are a new customer: a copy of the **last tax return forms**
- All **salary certificate(s)** for the relevant tax year for you and possibly for your spouse
- Annual **Financial Statements for self employed income** (balance sheet / income statement)
- Any **other income** such as directors' fees, attendance fees, lottery winnings etc.
- Any received income from **pension funds**, AHV/IV, health or accident insurance and unemployment insurance
- Attestations for any **lump sum payments** or **2nd pillar pay-outs and contributions** (retirement pension fund)
- Attestations related to **3rd pillar pay-outs and contributions** (restricted pension plan)
- Real estate** (in Switzerland or abroad), rental income and supporting documentation about details of **maintenance costs** and insurance premiums (invoices, receipts). Supporting documents for **mortgage balance** at end of year or on date of departure and interest paid
- Swiss bank statements** issued at the end of the year or on the date of your departure (reporting interest and dividends received as well as the balance of the account at year end or date of departure)
- Summary statements for **non-Swiss accounts** reporting interest and dividends received as well as the balance of the account(s) at year end or date of departure
- Summary statements of **stocks or bonds** that indicate the number and the value at year-end or your date of departure
- Any **additional business related expenses** that are not covered by the standard claims allowed (i.e. language courses not reimbursed by your employer)
- List of **health insurance** and accident insurance premiums
- Attestations of **life insurance contracts** (showing the surrender value)
- Certificate confirming the **family allowances, alimony** or child support payments paid or received
- Bank attestations for **debt and paid debt interest** as of 31.12. or date of departure
- Copies of **medical expenses** incurred and not reimbursed by your medical insurance
- Proof of **donations** paid to charities recognized under Swiss law
- Childcare expenses** (only applicable if both parents are working)
- Other assets, cars, gold, crypto currencies, art collections etc.