

How it works:

Please collect all required documents according to our checklist and add important information on a separate sheet (e.g. names and DOB of your children). Send *copies* of all documents by regular mail to our office and you'll receive your tax declaration ready for your signature.

Our prices incl. VAT

**Type A
from CHF 380.-** Single income, property in ZH with lump sum deductions, up to 5 asset positions, 2 debt positions

**Type B
from CHF 430.-** Double income, property in ZH with lump sum deductions, up to 7 asset positions, 2 debt positions

**Type C
from CHF 490.-** Double income, property in ZH with detailed deductions **or** up to 10 asset positions, 2 debt positions

These prices are only valid if a complete set of documents is provided according to this checklist. Missing information is requested on an hourly basis.

Documents sent electronically also cause additional work on our side and will lead to additional costs.

Add-ons like e.g. additional properties, international tax allocations or mid-year declarations are offered at additional cost.

For more details about our fees, please visit our website: www.expatriates-switzerland.com/tax-declaration

We're happy to give you a quote.

Your information will be handled confidentially. You'll get all documents back together with the finished tax declaration.

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.
 - Are you **self-employed**? Please call us at 044 523 66 77 for further instructions.
 - 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
- **Children**
 - **Name, date of birth**
 - Does the child live in your **household**? Or with somebody else? (in this case also the child's address and information on custody)
 - Statements documenting **childcare costs**
 - Directly paid **children's and family allowances** (if applicable)
 - 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 1st education (School, University, Apprenticeship etc.) on 31.12. please provide details and provisional end (year) of the education
- **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
 - Tax statements on assets (shares, funds, private equity etc.), including value on 31.12. and interest/dividends earned during the year
 - Statements documenting **asset management fees**
 - **Life insurances**: statement documenting the current cash surrender value
 - Statements on **inheritance** you received, including an inheritance that hasn't been paid out or that is still being split (date, value, name and address of deceased or donor)
- Statements on **capital payments or distributions** from the pension fund or pillar 3a
- Value of **other assets** of considerable value (e.g. oldtimer, boats, collections, noble metals 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.
- **Property (worldwide!)**
 - **Mortgage statements** see above "debt"
 - Statement documenting **imputed rental value** and **tax value** (fair value)
 - **Address** of the property
 - **Rental income** (if applicable)
 - Invoices documenting **maintenance and renovation costs for preserving the value of the property; building insurance**
 - Statement documenting **subsidies** you received for ecological or energy saving renovations.
 - **Purchase contract** (only for newly acquired 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
 - Tax statement of 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 need (name, address, date of birth, amount paid)

- **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) – on a separate sheet
- **For clients with US tax liabilities**
 - IRA and Roth IRA balance statement as per 31.12.
- **For Expatriates**
 - Rental contract
 - Employment contract
 - 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**.

To make sure we can contact you for any enquiries, please provide your details:

Phone number:

.....

Email address:

.....

Deloris AG, Bleicherweg 74, 8002 Zürich
www.deloris.ch, steuern@deloris.ch

 **Deloris**
Tax Accountants and Advisors