



Checklist for the tax declaration

Partner 1 / Single

Partner 2

Name

First Name

Street

Postcode, City

Date of Birth

Confession

Marital Status as of 31.12.(tax year)

Telephone

E-Mail

Children

First Name

Date of Birth

School

Start / End School

Confession

To be completed only if parents are taxed separately (please tick as appropriate)

Living in your household

Yes

No

Parental Care

Yes

No

Together

Alternating Care

Yes

No

Please tick the appropriate box for the following questions and enclose the corresponding copies of supporting documents.

Only for new clients

To enable us to process your tax return as efficiently and on time as possible, please submit the following documents:

Tax form

Copy of last tax return

Copy of last definitive taxassessment



Checklist for the tax declaration

Income (enclose copies)

Wage statements

Partner 1 / Single

Partner 2

Income from pensions

Other Revenue

Alimonies (enclose copies)

Maintenance contributions for spouses
(separated/divorced)

(Please incl. written agreement)

Paid

Received

Child support contributions

Assets (enclose copies)

Bank statements (incl. statements from banks abroad) as of 31.12. (of tax year)

Shares in companies

Name of the company:.....

Shares/funds/bonds/time deposits Receipts as of 31.12. (of the tax year)

Loan granted to (enclose contract).....

Debts (enclose copies)

Mortgages (incl. Those abroad) as of 31.12. (of tax year)

Other debts e.g. open tax invoices, credit cards etc.

Loan received from (enclose contract).....

Professional expenses Partner 1 / Single

Workload

Full-time

Part-time employed (in %).....

No. Of working days per week.....

Route to work

Car km/day (back & forth)

Public transport

Price Per year

Bicycle / Scooter

Self-paid (continuing) education or retraining (incl. invoice)

Professional expenses Partner 2

Workload

Full-time

Part-time employed (in %).....

No. Of working days per week.....

Route to work

Car km/day (round trip)

Public transport

Price Per year

Bicycle / Scooter

Self-paid (continuing) education or retraining (incl. invoice)



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Other deductions (enclose copies)

- Contributions to pillar 3a / 2nd pillar
- Health insurance premium
- Premium reduction
- Self-paid medical expenses e.g. glasses, dentist etc.
- Third care costs e.g. KITA, day care
- Retirement and nursing home costs

Real estate (enclose copies)

- Home Condominium ownership
- Rental income
- Estimation Order of the Tax Administration
- Property maintenance e.g. repairs etc.

Inheritances / Donations

- Donations on..... received from.....
- Donations on..... aligend to.....

- Inerhitance advance on..... received from.....
- Inerhitance advance on..... aligend to.....

- Inerhitance on..... received from.....

Name and date of death of the decedent.....

Other

- Lotto winnings (enclose winnings statement)
- Capital benefits e.g. retirement 3a or pension fund payments (enclose copy)
- Life insurance (enclose copy)
- Pension fund statement
- Donate (enclose copies)
- Other assets e.g. gold, pictures etc. (enclose receipts)
- Vehicles, boats Type / Brand:
- Vehicle registration no.:
- Year of purchase:
- Acquisition value in CHF:



Contract for the preparation of the tax return

Contractual Partner(s), hereinafter referred to as "Client":

Client	Spouse
Surname	
First name	
Address	

The client places an order with Caveo AG for the preparation of the tax return.
The preparation of the tax return is carried out against payment of a fee. The hourly rate is CHF 180.00, plus VAT.
It is billed according to time and effort.

Disclaimer

The information, explanations and calculations provided in the tax return are based on the information provided by the customer, the accuracy and completeness of which Caveo AG cannot verify. In the case of missing information, empirical values can be used if necessary. Any changes in the practice of the tax authorities are always reserved. The preparation of the tax return by Caveo AG does not replace the final audit by the customer. The involvement of a tax representative does not remove the duty of care arising from the duty to cooperate (§ 144 StG) as a taxpayer, but converts it into a duty of care regarding the selection, instruction and monitoring of the representative as well as the verification of his work results.

Caveo AG treats all documents and information provided to it confidentially. The tax return is prepared by Caveo AG in good faith. The final audit, the submission to the competent authority as well as the responsibility for the content are the responsibility of the client.

For the settlement of disputes arising from this contractual relationship, the ordinary courts of the Canton of Zurich are recognized as having jurisdiction. The exclusive place of jurisdiction is the authorized representative's place of business. Swiss law shall be applicable.

Please mark desired services:

- I wish a tax representation by Caveo AG (additional costs CHF 40.- / year; possible objections are not included).
- Copy of the completed tax return only as PDF by mail (no paper printout for the copy; only original for tax office)

I wish the documents to be returned by:

- A-Post (without surcharge)
- A Mail Plus, electronic tracking (surcharge CHF 5.00)
- Registered mail (surcharge CHF 10.00)

All income and assets worldwide must be declared.

Comments

Date and Place Signature Client

Date and Place Signature Spouse

Please complete the checklist and order form in full and send them in with your tax documents.