

Client	Spouse
Name:
First Name:
Date of Birth:
Street:
Zip Code, City:
Telephone:
Profession:

Living here since, previous address:

Civil status, since:.....

Children: Name, first name, date of birth:

Alimony: to / from who/m, amount per year:

Legacy, inheritance: to/from who/m, amount, date:

This assignment includes (please mention the number of your included documents)

Tax declaration:	Official form	.....
	Copy of last year's declaration (if available)	.....
Income:	Salary statement	.....
	Documents on your real estate income	.....
	Pension statement AHV	.....
	Pension statements pension fund	.....
	Pension statements life insurance	.....
	Statements of pension Income due to sickness / unemployment	.....
Assets:	Tax statements of bank accounts, insurance policies	.....
	Statements of investment depots	.....
	Interests / dividends	.....
	Buy and sell - orders	.....
	Cadastral Value of real estate property	.....
	Motor-Vehicles: make, type, year and price of purchase	.....
	Cash / other valuables	.....
Deductions:	Professional costs: travel, lunch/dinner costs, educational costs, other costs	.....
	Deposits in tax qualified Pillar 3a, pension fund	.....
	Property maintenance / loan: balance and paid interest	.....
	Doctor/Dentist bills, tax statement health insurance	.....
	Donations, childcare	.....

The customer instructs beatmunsch.ch to prepare the tax declaration based on the provided documents and information.

Place, Date:

Signature:

Here is how it works:

Via post

Send this checklist and all documents to:

**Beat Munsch
Steuerservice
Steinechtweg 24
4452 Itingen**

Online

You can upload all documents by using this link:

<https://www.dropbox.com/request/atITcd6NAvoXM2klQZg8>

Via e-mail

You can send all documents to:

consulting@beatmunsch.ch

Within two weeks you receive:

2 copies of your completed tax declaration

If applicable: suggestions to improve your tax situation.

Beat Munsch treats your information strictly confidential.

Thank you for your trust.



Beat Munsch