

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

Living here since, previous address:

If moved to / from Switzerland during tax year, (de)registration date

Civil status, since:.....

Children: Name, first name, date of birth:

Education: Kind of and graduation date:

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 Worldwide income from employment, pension, or any other source:

Job: Annual Salary certification (Lohnausweis)

Foreign income: monthly pay slips

Pension: Pension statement AHV

Pension statements pension fund / insurance

Pension statements life insurance

Unemployment: Annual Income certification from unemployment insurance

Sickness Statements of pension / insurance Income due to sickness

Alimonies: Total amount received from ... for which person

Assets The total worldwide wealth needs to be declared

Bank: Swiss bank accounts: Certification of interest and Balance

Non-Swiss bank accounts: full annual statement January to December

Balance as per December 31st and interest for the full year must be visible

Shares: Investment Depots: Statement showing total value and all held positions

Interests / dividends

Buy and sell - orders

Fixed deposits: Full statement, showing:

Begin and end date, principal and maturity amount, interest rate and amount

Real estate	Cadastral Value of real estate property	.....
<i>(Please provide</i>	Construction year, address, number of rooms	.....
<i>all information):</i>	Purchase date and price	.....
	If rented out: Monthly rent, total rent collected for number of months	.....
Life insurance:	Statement of tax value / surrender value, begin and end date of policy	.....
Other assets	Motor-Vehicles: make, type, production year and list price	.....
	Cash / other valuables, crypto holdings	.....

Deductions

Pension:	Contribution to pillar 3: Certification from Bank or insurance	.....
	Contribution to pillar 2: Certification from pension insurance	.....
Professional cost:	Travel: Address of workplace	.....
	If commuted by train: cost of monthly / annual train ticket	.....
Childcare:	Deductible, if both partners are working: Invoice / Tax certification from Kita	.....
Education:	Employment related education: Invoices for tuition fees or related	.....
Loan / Mortgage:	Certification of your bank over end of year balance and total paid interest	.....
Property cost:	All claimed cost needs to be backed up with a detailed invoice showing:	
	Date, invoiced amount, performed task, property it refers to	
Deductible is:	Maintenance / renovation which maintains the current value of the property	.....
	Insurance premium, foreign property tax	.....
Healthcare cost:	Tax certification of health insurance	.....
	Dentist bills	.....
Alimonies paid:	Copy of divorce agreement	.....
	Copy of bank transactions for alimony payments	.....
	Information: Who received the payments: name and address	.....
Family support:	Support payments can be deductible if all of the below requirements are met	
	Proof of the relationship (Parents, children, ..) and the obligation to support	.....
	Proof that the supported person was depending on the support	.....
	Proof of payment from your bank account to the other person's account	.....
	The total payments must be at least equal to the deduction amount:	
	E.G.: Basel Stadt: CHF 5'500, Swiss confederation: CHF 6'500	.....

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

Place, Date:

Signature:

Some suggestions for a smooth processing of your tax return

The quality and speed of your tax accountant's work is related to the quality and kind of information available.

Performing a tax return is a task which requires several hours of uninterrupted concentration. Every important information needs to be in place at this given time.

Any interruption, mainly because not all information is available, or also because another client squeezes in, can result in unwanted delay.

Therefore, we have these suggestions:

When you share your documents, please ensure that these standards are met:

- Please always complete the checklist with your personal and family information.
- Ensure, that the shared document contains all important information. As example, a bank statement should contain: Name of the bank, name of the account holder, account number, date range, currency, balance at the given date and interest for the full date range (tax year).
- Provide all files in good quality and a readable format, ideally PDF.
For this you might use a scanner or a cam-scanner.
A photograph of a document is generally not suitable.
- If a document has multiple pages, please bundle all pages as one file.
- Please give each file a proper name like:
2022 salary Novartis instead of *scan202301170098.pdf*
- Submit all files including the completed checklist in one bundle.
Submissions split over several days cause unwanted delay.

If you have **questions**, it is most effective to have a prepared communication. Therefore, instead of random calls or multiple e-mails, schedule a call. Here are the links for this:

- Phone call: <https://calendly.com/beat-munsch/phone-call>
- Zoom call: <https://calendly.com/beat-munsch/15min>

Especially during busy seasons, I really prefer a scheduled call over a random call just out of the blue. The reason is that as a structured personality, and you want your tax accountant to be structured, I prefer a scheduled event in my calendar. Then I am prepared and have all potentially required information in place and can help you with your problem.

Here are the options how to submit your files:

Online (preferred)

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

Via post

Please use post and don't drop your envelope in my letter box. The reason is, when I am travelling, Swiss post is either holding back delivery or forwarding your mail.

Beat Munsch

Steuerservice

Steinechtweg 24

4452 Itingen

Timing

If your tax accountant does more than just a handful tax returns per year, he probably needs to make use of the free extensions your canton offers. This even if the files initially were handed over when tax season starts. The reason is simply, that everyone does the same at the same time. The alternative would be, that your tax accountant hires temporary employees and increases (doubles) the rates.

So, I also use the free extensions. For the cantons I do most of the tax returns, the free extensions are:

- Basel Stadt: until September 30th.
- Basel Land: until May 31st for employees and August 31st for self-employed.
- Aargau: until June 30th.
- Solothurn: until July 31st.
- Berne: until July 31st.
- Zurich: until July 31st.

A further extension would cost CHF 40 in most cases. If required, I would apply for the same and deduce the cost from my invoice in case the files were fully submitted to me at least 30 days before the free extension ended.

Here is, how you get back your tax return

If you sent the files via post, you would get your tax return in printed version.

If the files were submitted electronically, I will share the tax return in a folder where you have access to for a limited time of 3 months.

If you want to keep a copy, you might download it from the shared folder.

General terms

Beat Munsch treats all information strictly confidential.

The information is stored in cloud storage, currently I am using Microsoft one drive.

The tax return is prepared with the information the client provides.

Beat Munsch takes no responsibility for not declared income or assets.

It is the client's responsibility to carefully use this checklist and provide all information regarding worldwide income and assets.

Thank you for your trust.



Beat Munsch