Checklist Taxes

tailor-made. holistic. for you.

Personal information

Person 1:

Surname/First name

Birth date

Denomination ☐ prot. ☐ rom.cath. ☐ chr.cath. ☐ none

Job title

Person 2:

Surname/First name

Birth date

Denomination ☐ prot. ☐ rom.cath. ☐ chr.cath. ☐ none

Job title

Marital status

Phone Nr./Cell phone Nr.

Email

Current adress

Street/Nr.

Postal code/City

Relocation? ☐ yes ☐ no

Relocation date

Children

Child 1:

Surname/First name

Birth date

Denomination ☐ prot. ☐ rom.cath. ☐ chr.cath. ☐ none

External care ☐ Education

Child 2:

Surname/First name

Birth date

Denomination ☐ prot. ☐ rom.cath. ☐ chr.cath. ☐ none

External care ☐ Education

Income

- ☐ Salary certificate
- ☐ Pension certificate: ☐ AHV ☐ PK
- ☐ Unemployment benefits
- ☐ Daily allowances
- ☐ Other

Job details

Place of work

Commuting ☐ Pub. transport ☐ Car

Workload %

Other

Training/Education ☐

Real estate

- ☐ Tax value
- ☐ Imputed rental value
- ☐ Rental income
- ☐ Maintenance costs
- ☐ Flat rate deduction
- ☐ Mortgage interest & capital statements
- ☐ Other

Retirement planning

☐ 3a ☐ 3b ☐ PK contribution ☐ PK withdrawal

Health insurance

- ☐ Health insurance

Other costs

Notes

Securities inventory

- ☐ Interest & capital statement for all accounts
- ☐ Tax statement for custody accounts

Upload

Other

- ☐ **Copy of last year's tax return**
- ☐ Debt
- ☐ Donations
- ☐ Inheritance/Gift
- ☐ Car (purchase price/year)
- ☐ Other wealth

Confirmation

Price:

Single person: 132.-, with property: 210.- / Family: 168.-, with property: 248.-

Coupon code

Advisor

Signature

Note: This checklist does not claim to be exhaustive

smzh ag
Tödistrasse 53, CH-8002 Zürich
+41 43 355 44 55
ste@smzh.ch