

TAX Declaration 2020 Checklist

Important:

Please send us all the documents received by the Tax Department without the guidelines. Check your personal Data on the declaration. **For new clients:** *Additionally to the documents received by the tax department please send the last Tax Declaration too.*

For queries:

Please mention your phone number and your E-Mail on a separate sheet.

Submission date for the TAX declaration is yearly always 31 March!

Did you already initiate the **EXTENSION**? If you are not able to answer this question with „YES“, we will do the extension for you!

Following documents and Information do we need to complete your TAX declaration:

- | | |
|--------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <input type="checkbox"/> Wage statement / pension book | wage statement / pension book |
| <input type="checkbox"/> Daily allowances / compensation for loss of earnings | certificates ALV, IV and insurance |
| <input type="checkbox"/> Alimony | evidence of receipt and paid alimony |
| <input type="checkbox"/> Self-employed | balance sheet, Income statement, cash book |
| <input type="checkbox"/> Professional expenditures | tickets (train, bus, tram), travel distance (car) |
| <input type="checkbox"/> Further education / retraining | invoices and description of the education |
| <input type="checkbox"/> Children | first name and surname, date of birth, school |
| <input type="checkbox"/> Liabilities as of 31.12.20XX | mortgage, loans and debt interests |
| <input type="checkbox"/> Restricted pension plan Pillar 3a | evidence / statements |
| <input type="checkbox"/> Purchasing into the pension plan | evidence / statements |
| <input type="checkbox"/> Bank and post statements as of 31.12.20XX | closing, balance and interest statements |
| <input type="checkbox"/> Support contribution / donations | evidence |
| <input type="checkbox"/> Securities account statement | security statements, shareholding statements |
| <input type="checkbox"/> Lottery winnings with withholding tax | |
| <input type="checkbox"/> Insurance costs | health insurance premiums (yearly statement) |
| <input type="checkbox"/> Life insurance and pension scheme | statement/evidence, surrender value |
| <input type="checkbox"/> Medical expenses and accident costs | invoice from doctor, drugs and dentists |
| <input type="checkbox"/> Vehicles | purchase price, year, leasing |
| <input type="checkbox"/> Expenses for people with disabilities | invoices for spending and receiving |
| <input type="checkbox"/> Property ownership | imputed rental value and tax value, Maintenance cost |
| <input type="checkbox"/> Nonparental supervision | invoices |
| <input type="checkbox"/> Capital payment | donations, anticipatory succession, inheritance, Pension fund payouts /redemption |
| <input type="checkbox"/> Undistributed inheritance | list of heirs |

Above mentioned list are examples for the most common documents and information needed to complete the declaration. For further information do not hesitate to contact us!