

## TAX Declaration 2019



Let your declaration be prepared by professional advisors.

We offer a fast and competent service for the fairest prices.

To avoid any waiting times please arrange an appointment with us:

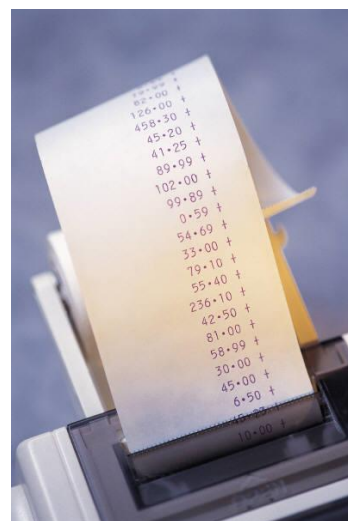
**+41 (0)43 / 928 29 37**

If you will send us your declaration by physical mail **have a look on our checklist** with the necessary documents and send it to following address:

Tredia GmbH  
Kasernenstrasse 1  
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Telefon: +41 (0)43 / 928 29 37  
E-Mail: [info@tredia.ch](mailto:info@tredia.ch)  
Homepage: [www.tredia.ch](http://www.tredia.ch)

We are your experts for:

- TAX
- Accounting and financial statements
- Value added taxes
- Payroll accounting and staff administration
- Consulting, Foundation, Liquidation
- Business valuations, Takeovers and Merger
- Succession plan
- Private financial plan
- Executor and inheritance



## TAX Declaration 2019 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"/> <b>Wage statement / pension book</b>                        | wage statement / pension book   |
| <input type="checkbox"/> <b>Daily allowances / compensation for loss of earnings</b> | certificates ALV, IV and insurance  |
| <input type="checkbox"/> <b>Alimony</b>  | evidence of receipt and paid alimony  |
| <input type="checkbox"/> <b>Self-employed</b>  | balance sheet, Income statement, cash book  |
| <input type="checkbox"/> <b>Professional expenditures</b>                            | tickets (train, bus, tram), travel distance (car)                                 |
| <input type="checkbox"/> <b>Further education / retraining</b>                       | invoices and description of the education   |
| <input type="checkbox"/> <b>Children</b>   | first name and surname, date of birth, school                                     |
| <input type="checkbox"/> <b>Liabilities as of 31.12.2019</b>                         | mortgage, loans and debt interests  |
| <input type="checkbox"/> <b>Restricted pension plan Pillar 3a</b>                    | evidence / statements   |
| <input type="checkbox"/> <b>Purchasing into the pension plan</b>                     | evidence / statements   |
| <input type="checkbox"/> <b>Bank and post statements as of 31.12.2019</b>            | closing, balance and interest statements  |
| <input type="checkbox"/> <b>Support contribution / donations</b>                     | evidence  |
| <input type="checkbox"/> <b>Securities account statement</b>                         | security statements, shareholding statements                                      |
| <input type="checkbox"/> <b>Lottery winnings with withholding tax</b>                |   |
| <input type="checkbox"/> <b>Insurance costs</b>                                      | health insurance premiums (yearly statement)                                      |
| <input type="checkbox"/> <b>Life insurance and pension scheme</b>                    | statement/evidence, surrender value   |
| <input type="checkbox"/> <b>Medical expenses and accident costs</b>                  | invoice from doctor, drugs and dentists   |
| <input type="checkbox"/> <b>Vehicles</b>   | purchase price, year, leasing   |
| <input type="checkbox"/> <b>Expenses for people with disabilities</b>                | invoices for spending and receiving   |
| <input type="checkbox"/> <b>Property ownership</b>                                   | imputed rental value and tax value, maintenance cost                              |
| <input type="checkbox"/> <b>Nonparental supervision</b>                              | invoices  |
| <input type="checkbox"/> <b>Capital payment</b>                                      | donations, anticipatory succession, inheritance, pension fund payouts /redemption |
| <input type="checkbox"/> <b>Undistributed inheritance</b>                            | 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!