

Checklist for tax-return documents



mandatory forms for each taxable person if positions exist			
position	received from	surcharge	comment
<input type="checkbox"/> Original tax form (or access date)	Tax office		
<input type="checkbox"/> Tax return order of ATG Business AG (completed and signed)	ATG Business AG		www.atg-business.ch
<input type="checkbox"/> Salary certificate/s	employer		
<input type="checkbox"/> Additional incomes (alimony, part-time job, subsidies, fire brigade salaries, pensions, etc.)			
<input type="checkbox"/> Interest and capital certificates for all bank accounts	bank		
<input type="checkbox"/> Tax certificate of the health insurance	health insurance		
<input type="checkbox"/> Receipts of self-paid medical expenses		CHF 5.-- each receipt	if available
<input type="checkbox"/> Receipts of donations			if available
<input type="checkbox"/> Documents according the questionnaire on the tax return order		from CHF 25.--	If answered with YES
<input type="checkbox"/> Receipts for the costs of outside care for the children		from order type „klassisch“	for childcare
<input type="checkbox"/> All purchase and sale documents for your investments	bank	from order type „klassisch“	or tax statement
<input type="checkbox"/> Tax certificate for life insurance policies (3a + 3b)	insurance		
<input type="checkbox"/> Tax certificate for pillar 3a bank accounts	bank		
<input type="checkbox"/> Certificates for credits/loans (personal loans, personal loans)	creditors		

mandatory documents for apartment and/or house owners			
position	received from	surcharge	comment
<input type="checkbox"/> Interest and capital certificate Mortgage debt	bank		
<input type="checkbox"/> Receipts for investments in own property (insurance costs/renewal funds/Invoices renovations/etc.)		CHF 5.-- each receipt	
<input type="checkbox"/> copy of the official treasure	land registry		

optional documentation			
position	received from	surcharge	comment
<input type="checkbox"/> Copy of previous year's tax return			only new customers
<input type="checkbox"/> Definitive tax assessment of the previous year	Tax office		only new customers
<input type="checkbox"/> Tax mandate for representation of tax authorities	ATG Business AG	CHF 180.-- per year	

If you have any questions, please do not hesitate to contact us:

by mail:

tax@atg-treuhand.ch

by phone:

071 740 94 80

Dispatch of all receipts to:

ATG Business AG
tax return
PO Box
9435 Heerbrugg