

## Checklist: Tax documents 2019

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### **Request for extension of submission deadline 2019:**

Please send us a.s.a.p. a copy of the first page of the tax declaration form 2019 by email, fax or post. We need this to get an extension of the submission deadline for the tax return.

Name: \_\_\_\_\_ Street: \_\_\_\_\_  
 ZIP/City: \_\_\_\_\_ Confession: \_\_\_\_\_  
 Email: \_\_\_\_\_ Telephone: \_\_\_\_\_

### **Required documents (only if applicable)**

- Original tax declaration forms 2019 (for all tax domiciles)
- Are you US citizen? Yes  No
- Information on important changes: Family status (Birth of child, marriage, separation, divorce), change of tax domicile, employment (retirement, self-employment), confession, Certification of University etc.
- New clients: Copy of the last tax return filed (incl. copy of the assessment by the tax authorities)

### **Documents on income:**

- All salary certificates (for the principal and sideline employment)  
(If self-employed: Financial statements or statements of income and expenses incl. details of employee involvements etc.)
- Board member fees
- Degree of employment in % if part-time
- Confirmation from the Unemployment Insurance Fund (ALV)
- Retirement income (from OASI, pension fund, accident insurance benefits etc.)
- Obtained alimony payments (personally, for children)
- Obtained capital / severance payments
- Obtained donations / inheritances / advance inheritance
- Lottery wins
- Capital withdrawals from old age provision (2<sup>nd</sup> / 3<sup>rd</sup> pillar)

### **Documents on deductions:**

- Tax deductible expenses (Travel cost: Car; SBB-/ZVB-ticket; meals (canteen), education (not children)
- Alimony payments (Copy of agreement)
- Third-party childcare cost (no tuition, no hobby)
- Contributions to people in Switzerland or abroad (name and address of recipient)
- Confirmation of contributions to a 3<sup>rd</sup> pillar accounts / of a 2<sup>nd</sup> pillar pension plan buy-in.
- Paid net rental expense in canton of Zug (Copy of rental contract)
- Premiums to private health insurance (all family members) / Health insurance premium reduction
- Uncovered illness and accident cost
- Statement on asset management cost paid (if higher than flat rate)
- Charitable donations or contributions to Swiss political parties

### **Documents on income from financial assets:**

- Bank account statements per 31. December 2019 (stating interest income / expenses)
- Bank account statements children (under 18 years) and gift-account
- Securities deposit statements per 31. December 2019 (stating income on securities in 2019)
- Statements on withholding taxes deducted in 2019 (all accounts incl. securities)
- Statements of cryptocurrencies (wallet print per 31. December 2019)
- Dividend revenues and payments
- Dividend payments of unvested employee involvements
- Rent deposit
- Deposit (for property purchase)
- Participation in undistributed inheritance



# Checklist: Tax documents 2019

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### Documents on properties worldwide (only for property owners):

- Statement on property rental income / imputes rental income
- Statement on property maintenance cost (Renovation, repairs, only building insurance etc.)
- Tax value of properties (Date of construction, purchase date and purchase price etc.)
- Jointly-owned property: Renewal fund (per 31. December 2019 / interest calculation)
- Gains/Losses from sale of property

### Wealth / Liabilities:

- Statement on granted employee shares / options (Portfolio of granted, vested, unvested, exercised)
- Investments in local and/or foreign companies (Financial statements 2019)

Companies managed by Fineac Treuhand:

- Loans receivable and interests revenues
- Life-/Pension insurances policies (Buy-back value per 31. December 2019)
- Motor vehicles (bought / leased): Label, purchase year, purchase prices
- Cash, gold and other metals
- Jewellery, collections (e.g. coins), art objects (e.g. paintings), horses, ships etc.
  
- Loans payable / Mortgages per 31. December 2019 (incl. stating interest expenses)
- Credit card debts
- Donations made

**Please send us the signed Checklist together with the original tax declaration forms and all required documents.**

I certify to have submitted all tax-relevant documents to Fineac Treuhand AG, Zug and have taken note of the GTC, which are published on the webpage ([www.fineac.ch](http://www.fineac.ch)).

City / Date: \_\_\_\_\_ Signature: \_\_\_\_\_

### Instructions to Fineac Treuhand Zug AG:

- Tax declaration to be sent by registered mail
- Tax declaration will be picked-up at your counter
- .....
- .....

### Contact details:

**Fineac Treuhand Zug AG**  
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 6300 Zug

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