

personal data	husband / single person	wife
surname:
first name:
address:
post code / domicile:
date of birth:
religion:
marital status 2022:
phone number:
E-mail:

children				
first name	date of birth	school or employer	beginning/end of school	denomination
.....
.....
.....

Only to complete if parents are taxed separately (please mark with a cross where appropriate)

	yes	no	mutual
part of your household	<input type="checkbox"/>	<input type="checkbox"/>	
parental custody	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
alternate custody	<input type="checkbox"/>	<input type="checkbox"/>	

In order to prepare your Swiss tax return efficiently and in due time, we kindly ask you to read our checklist carefully and to submit the respective documents completely. Thank you very much in advance for your cooperation!

- Important documents**
- Swiss tax forms
 - Copy of your last Swiss tax return
 - Copy of your last Swiss tax assessment (issued by tax authorities)

earnings (please mark where applicable)	husband/single pers.	wife
salary statement (please attach a copy)	<input type="checkbox"/>	<input type="checkbox"/>
income from pension fund (please attach a copy)	<input type="checkbox"/>	<input type="checkbox"/>
other earnings (please attach a copy)	<input type="checkbox"/>	<input type="checkbox"/>

alimony (please mark where applicable)	paid	received
payments to spouse (divorced/separated) (please attach written agreement)	<input type="checkbox"/>	<input type="checkbox"/>
payments for children (please attach a copy)	<input type="checkbox"/>	<input type="checkbox"/>
remarks:		

securities (please mark where applicable)

- bank statements (incl. accounts abroad) per 31.12.2022 **(please attach statement)**
- shares in companies **(please attach valuation)**
name of the company:
- shares/funds/bonds/fixed deposits **(please attach tax statements/buying- & selling statement)**
- dividends **(please attach statement of receipts)**
- loan granted to **(please attach agreement)**

liabilities (please mark where applicable)

- mortgage per 31.12.2022 **(please attach a copy)**
- loans received from **(please attach agreement)**
- other liabilities per 31.12.2022 **(please attach a copy)**
e.g. open invoice of taxes, credit card, etc.

work expenses husband / single person (please mark where applicable)

- workload full time part time(in %)
number of workdays a week
- Place of work:
- transportation expenses by car
from home to workkm/day (round trip)
- public transport **(please attach receipt)**
 - motorbike / bicycle
- self paid advanced training / retraining **(please attach invoice of seminar/course)**

work expenses wife (please mark where applicable)

- workload full time part time(in %)
number of workdays a week
- Place of work:
- transportation expenses by car
from home to workkm/day (round trip)
- public transport **(please attach receipt)**
 - motorbike / bicycle
- self paid of advanced training / retraining **(please attach invoice of seminar/course)**

other deductions (please mark where applicable)

- additional payments to 2nd or 3rd pillar **(please attach certificate for tax purposes)**
- health insurance premium **(please attach certificate for tax purposes)**
- price deduction of health insurance premium **(please attach a copy)**
- self-paid treatment expenses, e.g. glasses, dentist, etc. **(please attach a copy)**
- child care expenses **(please attach a copy)**
- costs for nursing home **(please attach paid invoices)**

owner of properties (please mark where applicable)

- house apartment
- estimation of tax value from tax administration **(please attach a copy)**
- rental income **(please attach receipt)**
- maintenance cost of property e.g. costs of repairs **(please attach copies of invoices)**

partial payment made / received for new / sold properties in 2022

- purchase contract **(please attach a copy)**
- amount **(please attach receipt)**

heritages / gifts (please mark where applicable)

- gift on received from:
- gift on presented to:
- advanced heritage on received from:.....
- advanced heritage on presented to:.....
- heritage on received from:
- name, domicile and day of death of decedent:
- undistributed heritage received from:
- name, domicile and day of death of decedent:

(please attach voucher for payment / receipts of the community of heritage)

others (please mark where applicable)

- Lottery winnings **(please attach statement of profit)**
- lump-sum benefit e.g. disbursement of pension fund **(please attach a copy)**
- life insurance **(please attach a copy)**
- donations **(please attach a copy)**
- other assets e.g. gold, pictures, etc. **(please attach receipt)**
- vehicles, boats **type/brand:**
- year of purchase:**
- purchase price/value:** CHF

remarks:

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My / our application to HMR Treuhand Group includes the following services:

- Preparation of the tax return & review of the tax assessment
- Submit objection (if necessary)
- Copy tax return by mail
- No need to return the original documents

husband / single person

wife

Thank you for your application!

Your HMR-Team