

# We want your tax return!

Simple tax return (pay slip and up to 4 bank accounts or debtors)  
CHF 140.00

Surcharge for an additional 4 securities /debtors CHF 20.00

Surcharge for home ownership (owner-occupied apartment or  
single-occupancy house) CHF 30.00

Arrange an appointment (Saturdays and evenings are also possible),  
send us your documents by post or put them in our letterbox:

## **Herakles Buchhaltungen GmbH**

Pfannenstielstrasse 16 - 8132 Egg ZH

Tel. 044 936 78 30 – [info@herakles.ch](mailto:info@herakles.ch) – [www.herakles.ch](http://www.herakles.ch)

**Also for firms: accounting – taxes – incorporation – advice**

**Checklist – Tax Return**
**Required documents/information (where applicable):**

- Details of changes to your personal details (page 1 of the tax return).....
- Children over 15 years of age in education?  
 Information about the school or apprenticeship (name, duration, if it is new or has changed) .....
- Pay slip(s) (Lohnausweis).....
- AHV/IV old-age, survivor's/invalidity pension statements and pension fund  
 (or bank receipt of a payment).....
- Daily allowance certificate from the unemployment office .....
- Permit for daily allowances from insurance policies.....
- Documents of secondary incomes (e.g. as a caretaker) .....
- Details concerning alimony payments (from whom / paid to whom,  
 incl. address, amount, division of personal contributions / child alimony).....
- Details of commute to work (train, car, number of weekly journeys) .....
- Details of hours worked (if not employed on a 100% basis).....
- Proof of costs of training and in-work training, retraining schemes .....
- Confirmations of deposits into pillar 3a / or extraordinary 2nd pillar .....
- Amount of last years health insurance premiums paid or annual statement from the health insurer.....
- Receipts of charity donations (if the total exceeds CHF 300.00).....
- Childcare costs (if both parents are in employment) .....
- Statement from the tax office concerning the imputed rental value /  
 2009 taxable value for home ownership (if this has not been sent to us previously).....
- Documents of property maintenance.....
- Apartment ownership: last annual statement of joint costs .....
- AHV payments from non-employed and self-employed persons: document .....
- Settlement documents (interest and balance statements) of all bank accounts .....
- Securities account statement or overview of shares / funds / bonds.....
- Check that you have retained a receipt for all entries in last years list of securities
- Purchase or dividend statements / coupon settlements of shares / funds / bonds.....
- Details for owned motor vehicle (type, year, price when new) .....
- Confirmation of the taxable value of life insurance policies.....
- Interest and balance confirmation for a mortgage / loan / other debts .....
- Certificate of pay-out from pension fund / pillar 3a.....
- Details concerning gifts, inheritance amount and undistributed inheritances .....
- Tax forms supplied by the tax office .....
- If you had significant dental treatment or other medical costs that were not borne by your  
 health insurer, please enclose the relevant receipts.....

Other comments: .....

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Contact informations:

Email:..... Tel:.....

**I would like to receive a copy of my tax return as a PDF file – not as a paper copy**