



Individual

Check-list for preparing your tax return

This list is not complete, if documents are not listed below, please attach them to your file!

Surname, First name:

Telephone:

Address:

- A copy of your last tax return
- List of changes in details for situation during the year of coverage:
 - marriage, succession, divorce, birth, inheritance
 - change of address, employer, situation, children
- Blank forms for preparing your tax return
- Yearly salary certificate (s) and your activity rate (s) :%%
- For pensioners, pension certificate (AHV, CP, etc.) received during the year of coverage
- Certificates of alimony or Collected paid or collected
- Certifications for other income and family allowances (peripheral income)
- Attestations of contributions paid to one or more 3rd pillars
- Your travel expenses (distance in km between your home and the workplace): km
- The details of your medical expenses with all the supporting documents (if possible, attach a certificate of participation fee of your health insurance fund)
- Certificate of bank interest and tax statements of securities fill 31.12
- Certificates for bank loans, copy of your credit agreement (s) or debt (s)
- Certificates of surrender values of your life insurance policies 3B
- Please mention the amount of your net annual rent (excluding charges, parking space or garage)
CHF :(if possible attach a copy of the leases)

For people who have purchased a new property during the year:

- Address of the propriety :
- Date of purchase :
- Year of construction :
- Living space :
- Tax estimate of the property or copy of the act of purchase :
- Details of mortgages or other financing

For people who already own property or in case of acquisition of the property during the year:

- Mortgage interest returns paid during the year
- Detail of your building maintenance costs or EPP expense statement
- Certificate of interest on the investments of the renovation fund (only for PEPs)

We kindly ask you to submit all the documents at the reception desk of our next branch or send them by mail to the address:

Swiss Keys Management SA
Secteur fiduciaire
Route du Simplon 5
1800 Vevey

- I would like to be contacted for an interview as part of the filling out of my tax return
- I do not want to be contacted for an interview as part of the filling of my tax return