



How to Fill in Your Tax Return

Step by Step

Collecting necessary documents

Collect the necessary documents you need to complete your tax return for the respective calendar year

- Salary statements
- Annual statements
- Bank statements and receipts
- Statement of contributions to tied private pension savings (pillar 3a)
- Statement of cash value of life insurance policies
- and more required documents

Filling in with BaTax

Fill in your tax return by hand with forms or electronically with BaTax.

BaTax will help you fill in your tax return in 10 steps

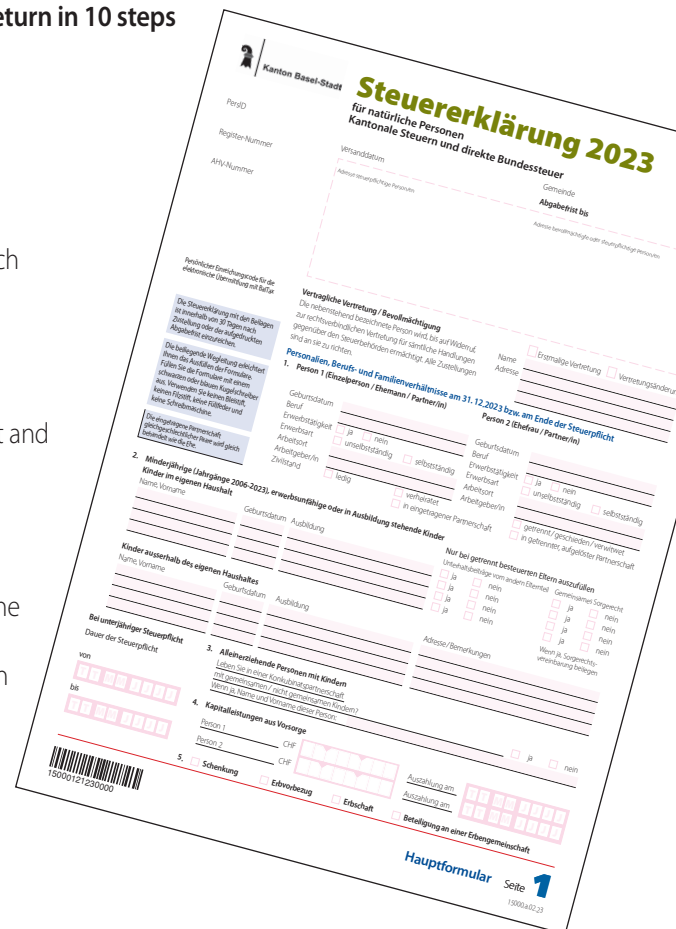
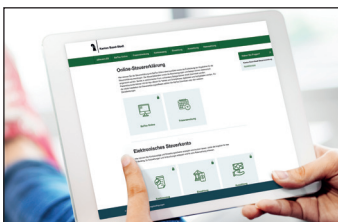
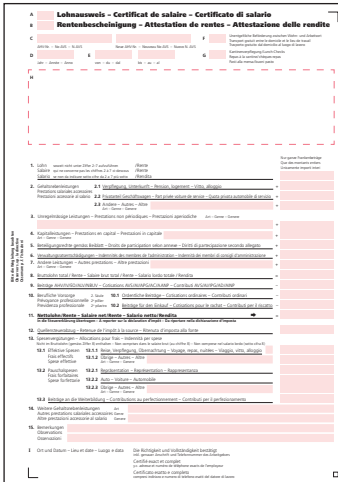
1. Select the download
2. Fill in your personal data
3. Enter your income
4. Enter your deductions
5. Enter your assets
6. Verify your data automatically
7. Make your tax calculation how much you will have to pay
8. Store your data for the next year
9. Submit your data electronically or print the forms
10. Sign your receipt or signature sheet and send with the required documents

Submitting on time

Submit your tax return together with the required documents within 30 days of receipt or by the preprinted submission deadline.

Paying in time

Pay your taxes on time to avoid late payment interest.



Seite 1 Page 1	Personalien, Berufs- und Familienverhältnisse	Personal data, Professional status and family circumstances
	Einzelperson / Ehemann / Partner (P1)	single person / husband / partner (P1)
	Ehefrau / Partner (P2)	wife / partner (P2)
	Geburtsdatum	date of birth
	Beruf	profession
	Erwerbstätigkeit ja	in work
	Erwerbstätigkeit nein	not in work
	unselbständig	employed
	selbständig	self-employed
	Arbeitgeber	employer
	Arbeitsort	place of work
	Zivilstand	marital status
	ledig	single
	verheiratet	married
	getrennt / geschieden / verwitwet	separated / divorced / widowed
	Minderjährige, erwerbsunfähige oder in Ausbildung stehende Kinder im eigenen Haushalt	minors, incapacitated children or children in education in own household
	ausserhalb des eigenen Haushaltes	outside own household
	Allein erziehende Personen mit Kindern	single person with children
	Befreiung von der Feuerwehersatzabgabe	exemption from fire brigade substitution tax
	Kapitalleistungen aus Vorsorge	lump sum payments from social security an other insurance benefits
	Schenkung / Erbvorbezug / Erbschaft	gift / early inheritance / inheritance

Seite 2 Page 2	Einkünfte im In- und Ausland	Income from Switzerland and abroad
	Einkünfte aus unselbständiger Erwerbstätigkeit	income from employment
100/105	Haupterwerb	main income
110/115	Nebenerwerb	subsidiary income
120/125	Andere Entschädigungen	other compensation
	Einkünfte aus selbständiger Erwerbstätigkeit	income from self-employment
100/105	Haupterwerb	main income
110/115	Nebenerwerb	subsidiary income
170/175	Personengesellschaft	business partnership
	Einkünfte aus Sozial- und anderen Versicherungen	income from social security and other insurance benefits
	Weitere Einkünfte	other income
	Einkünfte aus Vermögen	income from assets
369	Guthaben, Wertschriften und Lotterien	deposits, credit balances, securities and lottery winnings
479	Liegenschaften	properties
	Total der Einkünfte	total of income

Seite 3 Page 3	Abzüge	Deductions
519/539	Berufskosten bei unselbständiger Erwerbstätigkeit	professional expenses
550	Schuldzinsen	interest on debts
	Beiträge an Vorsorgeeinrichtungen und Versicherungen	contributions to pension and savings schemes
620/625	Gebundene Selbstvorsorge (Säule 3a)	tied private pension savings (pillar 3a)
630	Abzug für Versicherungen Ehegatten / P1+P2	deductions for insurance premiums spouses / P1+P2
631	Abzug für Versicherungen alle übrigen Personen	deductions for insurance premiums all other persons
632	Zuschlag für Kinder und unterstützte Personen	supplement for children and supported persons
	Weitere Abzüge	other deductions
652/657	Berufsorientierte Aus- und Weiterbildungskosten	costs for further education and retraining
660	Abzug bei Erwerbstätigkeit beider Ehegatten / P1+P2	deduction where both spouses / P1+P2 gainfully
680	Beiträge an politische Parteien	donation, political party
699	Total der Abzüge	total of deductions
709	Reineinkommen	net income
725	Krankheits-, Unfall- und Behinderungskosten	health, accident and disability costs

Seite 3 Page 3	Abzüge	Deductions
732	Zuwendungen	contribution
	Sozialabzug	welfare deductions
750	Abzug für Kinder	deduction for children
755	Abzug für unterstützte Personen	deduction for supported persons
757	Abzug für unterstützte Konkubinatspartner mit Kindern	deduction for supported cohabitant with children
760	Abzug für Ehegatten / P1+P2	deduction for spouse / P1+P2
765	Abzug für allein erziehende Personen (nicht für Konkubinatspaare)	deduction for single parents (not for cohabitant couple)
767	Abzug für alle übrigen Personen	deduction for all other persons
770	Abzug für allein stehende Rentner/innen	deduction for single pensioners
799	Steuerbares Einkommen	taxable income

Seite 4 Page 4	Vermögen im In- und Ausland	Assets in Switzerland and abroad
	Privatvermögen	private assets
800	Guthaben und Wertschriften	deposits / credit balances and securities
815	Lebensversicherungen	life insurance policies
821	Liegenschaften	properties
835	Bargeld, Edelmetalle und übrige Vermögenswerte	cash, precious metals and other assets
	Geschäftsvermögen	business assets
840/845	Aktiven gemäss Bilanz	assets as per balance sheet
860/865	Anteile an Personengesellschaften	shares in business partnerships
	Schulden	debts
870	Privatschulden	private debts
872/873	Geschäftsschulden	business debts
	Steuerfreie Beträge	allowances
	Steuerbares Vermögen	taxable assets

Wertschriftenverzeichnis	Securities Inventory
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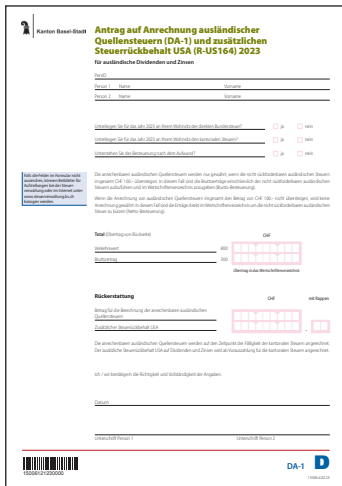
Seite 1 Page 1	Gemachte Schenkung	gifts made
	Erhaltene Schenkung	gifts received
	Erhaltene Erbschaft	inheritance received

Seiten 2/3 Pages 2/3	Guthaben und Wertschriften	deposits / credit balances and securities
	Orginalwährung	original currency
	Nennwert / Stückzahl	nominal value / number of securities and shares
	Valoren-Nr.	securities number
	Bezeichnung der Vermögenswerte (Guthaben, Aktien, Obligationen)	description of assets (credit balances, shares, bonds)
	Zugang	date of purchase
	Abgang	date of sale
	Einheitswert	assessed value
	Verkehrswert	market value
	Bruttoertrag A	gross income on assets subject to Swiss withholding tax
	Bruttoertrag B	gross income on assets not subject to Swiss withholding tax
	Ihr Verrechnungssteueranspruch	your Swiss withholding tax entitlement

Seite 4 Page 4	Berechnung Einkommen	calculation of income
	Berechnung Vermögen	calculation of assets
	Rückerstattung der Verrechnungssteuer	reimbursements of Swiss withholding tax

Formular Berufsauslagen	Professional Expenses Form
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500/520	Pauschalabzug für Berufskosten	lump sum deduction for professional expenses
503/523	Fahrkosten zwischen Wohn- und Arbeitsstätte	transportation expenses between home and work
504/524	Mehrkosten für auswärtige Verpflegung	additional costs for eating out
510/530	Mehrkosten bei auswärtigenm Wochenaufenthalt	additional costs for weekly stay at place of work
516/536	Auslagen bei Nebenwerb	expenses for subsidiary income
519/539	Total der Berufsauslagen	total professional expenses



Seite 1 Page 1	Antrag auf pauschale Steueranrechnung und zusätzlichen Steuerrückbehalt USA	request for lump-sum tax credit and additional withholding tax USA
	Rückerstattung	refund
Seite 2 Page 2	Bezeichnung der Kapitalanlagen	description of assets
	Staat	country
	Valoren-Nr.	securities number
	Zugang	date of purchase
	Abgang	date of sale
	Nennwert / Stückzahl	nominal value / number of securities and shares
	Verkehrswert	market value
	Bruttoertrag	gross income
	Betrag für die Berechnung der pauschalen Steueranrechnung	amount for the calculation of lump-sum tax credit
	Zusätzlicher Steuerrückbehalt USA	additional withholding tax USA



aus Seiten 6/7 from pages 6/7	Persons who lived in the canton of Basel-Stadt as of December 31 of the respective calendar year, left the canton of Basel-Stadt and moved to a place abroad in the respective calendar year, owned real estate or businesses in the canton of Basel-Stadt in the respective calendar year have to file a tax return, unless they are subject to the Swiss withholding tax only. Foreign workers who do not have permanent residency status, but who are domiciled in the Canton of Basel-Stadt, are taxed at source for income derived from non-self-employed work. These withholding tax rates correspond to the cantonal tax and direct federal tax rates which are imposed within the framework of the ordinary tax procedure. It is essentially the case that persons whose income is taxed at source are not obliged to submit tax returns such as is required by the ordinary tax procedure. However, a retrospective ordinary tax assessment will be conducted inter alia if the income which has been taxed at source of a person domiciled within the Canton exceeds CHF 120,000 in a calendar year.
aus Seiten 9/10 from pages 9/10	Cantonal income and asset taxes as well as the fire brigade substitution tax are payable on 31 May of the calendar year which follows the tax period. Federal income tax is payable on 1 March of the calendar year which follows the tax period.
aus Seite 18 from page 18	Lump sum payments from social security and other insurance benefits are taxed separately from other income at a reduced tax rate.
aus Seiten 19/20 from pages 19/20	All revenues whatsoever earned from employment, irrespective of their description or form, must be declared as income from employment. Taxable is the net income from employment (Nettolohn).
aus Seiten 30/31 from pages 30/31	Cantonal deduction: As a general rule a lump sum amount of CHF 4,000 for professional expenses to generate income is deductible. A lump sum deduction may be claimed in place of proven actual professional expenses such as transportation costs between home and work, additional costs for eating out, other expenses necessary for exercise of the profession and expenses in connection with a subsidiary occupation. Federal deduction: Other professional expenses to generate income are deductible as lump sum to 3% of net income from employment (Nettolohn). Minimum and maximum amounts apply. Where higher costs are claimed under other professionals expenses, no lump sum deduction may be made in addition. Costs for public transportation can be deducted only as transportation expenses for the journey from home to work and back. As an exception, costs for private vehicles can be deducted under certain circumstances. If returning home during lunch is impossible, additional costs for eating out are deductible. Deduction depends on whether the employer contributes to the costs (partial deduction) or not (full deduction).
aus Seite 39 from page 39	All income and all assets worldwide must be declared. Income and assets not taxable in Switzerland are taken into account for the assessment of the tax rate.