



# 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 BalTax Online

Fill in your tax return by hand with forms or online with BalTax.

### BalTax Online will help you fill in your tax return in 10 steps

1. Create an ePortal account (AGOV)
2. Log in to BalTax Online
3. Fill in your personal data
4. Enter your income
5. Enter your deductions
6. Enter your assets
7. Verify your data automatically
8. Make your tax calculation how much you will have to pay
9. Upload your documents
10. Submit your data electronically or print the forms

### 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
	unselbstständig	employed
	selbstständig	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 unselbstständiger Erwerbstätigkeit	income from employment
100/105	Haupterwerb	main income
110/115	Nebenerwerb	subsidiary income
120/125	Andere Entschädigungen	other compensation
	Einkünfte aus selbstständiger Erwerbstätigkeit	income from self-employment
150/155	Haupterwerb	main income
160/165	Nebenerwerb	subsidiary income
170/175	Personengesellschaft	business partnership
200–265	Einkünfte aus Sozial- und anderen Versicherungen	income from social security and other insurance benefits
280/285	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
499	Total der Einkünfte	total of income

Seite 3 Page 3	Abzüge	Deductions
519/539	Berufskosten bei unselbstständiger Erwerbstätigkeit	professional expenses
550	Schuldzinsen	interest on debts
600–615	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	Nettoeinkommen	net income
725	Krankheits-, Unfall- und Behinderungskosten	health, accident and disability costs



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	<p>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.</p> <p>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.</p>
aus Seiten 9/10 from pages 9/10	<p>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.</p> <p>Federal income tax is payable on 1 March of the calendar year which follows the tax period.</p>
aus Seite 18 from page 18	<p>Lump sum payments from social security and other insurance benefits are taxed separately from other income at a reduced tax rate.</p>
aus Seiten 19/20 from pages 19/20	<p>All revenues whatsoever earned from employment, irrespective of their description or form, must be declared as income from employment.</p> <p>Taxable is the net income from employment (Nettolohn).</p>
aus Seiten 30/31 from pages 30/31	<p>Cantonal deduction: As a general rule a lump sum amount of CHF 4,200 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.</p> <p>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.</p> <p>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.</p> <p>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).</p>
aus Seite 39 from page 39	<p>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.</p>