



Bonfina Treuhand GmbH
Hauptgasse 50, CH 4500 Solothurn
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www.expattax.ch

Information sheet

Tax filing process

STEP 1

YOU **contact** us.

STEP 2

TOGETHER we **discuss your personal situation** either on the phone or in our offices in Solothurn and we give you a preliminary cost estimate for our service. This initial consultation is without any obligation on your side and free of charge.

STEP 3

If you agree to work with us WE send you a one-page **list of the information and documents** which are 'normally' needed to prepare the tax return. Not everything on this list will apply to your situation, but it is also a checklist so that we do not forget or miss anything. In case of questions feel free to contact us.

STEP 4

YOU **send us the relevant information and documents** either by email or by post mail. Alternatively, we can create access to our portal where you can upload the documents. *Confidentiality statement:* We will keep confidential all the information and documents that we obtain from your side. This will only be used for the purpose of preparing your Swiss tax return.

STEP 5

WE review the documents and **prepare a first draft of the tax return** and tax calculation. We will send you a notice if anything is missing or if there are any questions.

STEP 6

WE prepare the **final version** of the tax return and tax calculation and send it to you by email **for your review** and approval.

STEP 7

Upon your approval **we send you the tax return to your home address for signature and filing.**
Together with the tax return we will send you:

- Instructions on where to sign the tax return plus an envelope for sending the tax return to the tax office.
- A tax proxy. With this proxy the tax office will contact us if they have any questions and we will get (a copy) of the final tax assessment so that we can check it. The proxy can be revoked at any time.
- Our invoice.

STEP 8

After the tax return is filed, the **tax office** will check it and issue the **final assessment** and the final tax bill. This usually takes several months, in Zürich up to 1 ½ years...

The final tax assessment will either confirm our figures or list any deviations. In case of deviations there is a deadline of thirty days to raise an objection.

STEP 9

Optional:

If you have given us a proxy to be your tax representative, then we will receive (a copy) of the final tax assessment. In this case, WE will check the tax assessment and inform you on the result. If there are any deviations, we advise whether filing an objection is advisable and promising.

If you have not appointed us as your tax representative, then we will not receive (a copy) of the final tax assessment. You will need to forward this document to us upon receipt, if you want us to check it.

STEP 10

If you entrust us again with your tax matters for the **next year** we re-start at STEP 4 for the next tax return.

If you have any questions, please do not hesitate to contact us

by email: taxteam@expattax.ch

or by phone: +41 32 623 30 55